ALASKA VISITOR ARRIVALS AND PROFILE FALL/WINTER 2000-01

Prepared for the

State of Alaska, Department of Community and Economic Development

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Prepared by

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In association with

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Contents

Figure **Page**

Acknowledgements

Abbreviations and Definitions

Abbreviations

AMHS	Alaska Marine Highway System
ATIA	Alaska Travel Industry Association
AVSP	Alaska Visitors Statistics Program
B.C.	British Columbia, Canada
DCED	State of Alaska, Department of Community and Economic Development
RAS	Random Arrival Survey
VES	Visitor Expenditure Survey
VFR	Visiting Friends and Relatives
VOS	Visitor Opinion Survey

Definitions

Business Only	One of the categories in "purpose of trip" for visitors traveling to Alaska. A purpose of trip category that describes those visiting Alaska, but for business only reasons.
Business / Pleasure	The purpose of trip category for those traveling to Alaska for a mixture of business and pleasure reasons.
Confidence Interval	See Margin of Error.
Independent	One of the thee types of travelers. Independent visitors are those who plan to purchase all items of their trip themselves – they do not plan to purchase tours or other commercially packaged activities. (See also Inde-Package and Package.)
Inde-Package	One of the thee types of travelers. Inde-package visitors are those who plan to purchase some items of their trip themselves, but who also plan to purchase a commercially available tour or other packaged/marketed activity. (See also Independent and Package.)
Margin of Error	The amount above and below a particular estimate or statistic needed to ensure that the range contains the true number being estimated. (Margins of error should be calculated separately for each statistic. Margins are provided in the appendix for most statistics in this report.)
Package	One of the thee types of travelers. Package visitors pay a single price for all elements of their trip (lodging, tours/excursions, etc.)
RAS	Survey conducted with visitors, by way of an intercept interview, as visitors first arrive in Alaska.
Secondary Arrival Report(s)	Arrival reports that are prepared in non-survey years. These reports are based on visitor counts conducted in survey years.
Total Arrivals	All arrivals to the State of Alaska – arrivals made by residents and visitors combined.
Vacation/Pleasure	The purpose of trip category to describe those visitors traveling primarily for vacation or pleasure.
VFR	The purpose of trip category for those visiting friends and relatives who live in Alaska.
VES	Visitor expenditure diary given to all visitors participating in the AVSP.
VOS	Visitor opinion survey – mailed, as a follow up survey, to all visitors participating in the AVSP.
Visitors	Non-residents traveling to Alaska; does not include seasonal workers. The major visitor categories are vacation and pleasure, visiting friends and relatives, business and pleasure, and business only.

Visitor Percentage(s)   The portion of total arrivals for a given mode of entry that are visitors

Visitor Tallies   Counts conducted by surveyors to determine the portion of people that are visitors on randomly selected boats, planes, and cars.

Executive Summary

The Alaska Visitors Statistics Program (AVSP) is a significant visitor industry research project conducted periodically by the State of Alaska. The AVSP provides the state and the visitor industry with critical data on the visitors that travel to Alaska. These data include information on the number of visitors, general demographic and other characteristics of the visitor population, as well as information on visitor expenditures, activities, and opinions.

This report presents information on the number of visitors that arrived in Alaska in the Fall/Winter season of 2000-01 and provides a demographic profile of those visitors. The profile includes information on the mode of arrival, purpose of visit, length of stay, mode of intended departure from Alaska, age of visitors, size of traveling parties, place of origin, general demographic information on those visitors, and whether those visitors have been to Alaska on other trips.[1]

Survey Changes

The AVSP that began on October 1, 2000 was the fourth such survey research project conducted by the State of Alaska. Previous AVSP studies were conducted in 1985-86, 1989-90, and 1993-94. Changes and improvements have been made with each AVSP. For AVSP IV, these changes included, but were not limited to the following:

- Additional survey locations and techniques

- Larger sample size

- Single survey population

- Clearly defined economic unit

- Publicly available data

- Improved alignment with public agency data

The underlying methodology for AVSP IV was based on the methodology used in AVSP III. This was a requirement for the project to ensure that data collected in different years would be comparable and trends could be extended. Changes were carefully analyzed prior to approval to ensure that the quality and/or comparability of data would not be compromised. All changes are described in detail in the report.

Major Findings

AVSP IV resulted in the following major findings for Fall/Winter 2000-01:

- Alaska received 254,500 visitors during Fall/Winter 2000-01, which represented a 10-15 percent increase from visitor arrivals in Fall/Winter 1998-99 (the last year in which an arrival count was conducted).[2]

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[1] The purpose of the project and limitations to the data are discussed in the report. As the data are designed to give accurate information about the visitor population as a whole, care should be taken when using the data to describe certain subsets of visitors. For example, AVSP data may not support detailed analysis of visitors from specific states or countries other than the U.S., or detailed analysis of arrivals to specific communities in Alaska.

[2] Total arrivals (residents and visitors combined) and visitor arrivals shown in this report are approximately 20 percent higher than those shown in the Secondary Arrival Count report for Fall/Winter 1998-99 (the last year in which an arrival count was conducted). It is important to note, however, that a portion of the

- Approximately 34 percent of the total arrivals were visitors – similar to percentage estimates from other arrival counts in the 1990's.

- Business Only is the most common trip purpose in Fall/Winter.

Visitor Characteristics

Data collected from October 1, 2000 through April 30, 2001 reveal that visitors are likely to do the following or to have the following characteristics[3]:

- To arrive and to depart by domestic air

- To be from the U.S., with an emphasis on the western states

- To be male

- To be in the 31-40 age group

- To be employed full-time

- To have visited Alaska before

- To travel alone or in a very small group

- To stay in Alaska for 7 days or less

- To have a household income in the range of $50,000 to $74,999

Visitor Arrival Estimates

Table ES-1 shows total arrivals, which include both visitors and residents of Alaska, as well as total visitor arrivals in Fall/Winter 2000-01.

Table ES-1. Total Arrivals and Total Visitor Arrivals
Fall/Winter 2000-01

Total Arrivals (Residents and Visitors)	Percentage Visitors	Total Visitors
754,700	34	254,500

Notes:

Numbers in table have been rounded and summarize the results provided in other parts of the report. As a result, it is difficult to derive one number in the table from the others.

Total arrival figures come from U.S. Customs data at highway stations, airports and airlines, cruise lines, and the Alaska Marine Highway System. These figures provide the foundation for the visitor estimates. Estimating the number of visitors that arrive in Alaska is a two-step process. The first

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increase is due to the fact that more arrival locations were considered in AVSP IV than in previous arrival studies. For example, previous studies did not include highway arrivals at Haines or any arrivals by motorcoach. Including those arrivals immediately increases the number of total and visitor arrivals relative to previous studies. The statement above that visitor arrivals have increased by 10-15 percent over the last two years includes an adjustment for changes in sampling. The unadjusted increase is roughly 20 percent.

[3] Note: characteristics should be viewed independently rather than as a set of characteristics that describe the average visitor.

step is to determine, for each mode of entry, the percentage of arrivals that are visitors. The second step is to calculate the number of visitors that arrive by each mode of entry using properly weighted visitor percentages from the first step and the total arrival figures. In some cases, the total arrival figures may need to be adjusted for double counting (accounting for the fact that one visitor can enter the state multiple times on a single trip). The total number of visitors is simply the sum of the number of visitors that arrive by each mode. The properly weighted visitor percentages are used in subsequent years, along with new total arrival figures, to generate new visitor arrival estimates. These estimates are presented in the secondary arrival reports.

Visitor percentages (shown in Table ES-5 below), are based on actual counts of visitors and residents on boats, planes, and cars entering Alaska.

Table ES-2 shows trends in total arrivals. Total arrivals in 2000-01 in Table ES-2 are calculated and presented in the same manner as in previous AVSP reports. Adjustments are explained in the table notes. Total arrivals are lower for ferry and international air in Fall/Winter 2000-01 than in Fall/Winter 1998-99. The decline in arrivals by these two modes suggests that visitor arrivals will also be lower for those modes. (The only way that visitor arrivals could increase when total arrivals have decreased is if there is a sufficiently large increase in the percentage of arrivals that are visitors.). Overall, total arrivals in Fall/Winter increased approximately 20 percent from 1998-99 to 2000-01. More than half of that increase is due to more travel by residents of Alaska and the remainder is due to an increase in the number of visitors.

Table ES-2. Total Arrival Trends (Residents and Visitors)
Fall/Winter 1993-94 to 2000-01

	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99 [a]	2000-01
Mode	**AVSP III**	**Secondary Arrival Count Reports**					**AVSP IV**
Cruise Ship	na	na	na	1,456	100	171	**189**
Domestic Air	506,198	540,407	522,257	588,021	528,441	551,934	**679,742** [b]
Ferry	12,603	10,069	10,679	9,621	7,480	9,540	**9,519**
Highway – personal vehicle [c]	29,494	31,271	31,327	30,638	36,109	32,840	**35,061** [d]
Highway – Motorcoach	610	484	452	518	518	935	**840** [e]
International Air	7,521	9,280	12,070	10,814	9,178	11,144	**9,538** [f]
Other	21,237	25,547	34,110	26,735	26,539	20,663	**19,466** [g]
Total Arrivals	**577,663**	**617,058**	**612,895**	**667,737**	**608,365**	**627,227**	**754,355**

Sources: Data for 1994-1999 from Arrival Count Reports and data for 1993-94 from Alaska Visitor Statistics Program Alaska Visitor Arrivals Fall/Winter 1993-94 prepared for the State of Alaska, Department of Community and Economic Development by McDowell Group; data for 2000-01 collected by Northern Economics, Inc. for AVSP IV.

Notes:

na = not applicable; no cruise ships in these years.

[a] No arrival count conducted in 1999-2000.

[b] Figures in reports from 1993-1999 do not include arrivals at smaller airports such as Sitka and Kodiak (only arrivals at the largest four airports – Anchorage, Fairbanks, Juneau, and Ketchikan are included in the domestic air arrivals category). Arrivals at the smaller airports were included in the "Other" category. To permit easy assessment of trends, figures for 2000-01 are presented in the same manner. Comments are provided in cases where this convention is not followed.

[c] Figures in reports from 1993 to 1999 do not include arrivals on the Haines Highway. As such, figures for 2000-01 are presented net of passenger activity on the Haines Highway.

[d] 46,347 including arrivals on the Haines Highway. No adjustment for double counting.

[e] 1,319 including arrivals on the Haines Highway. No adjustment for double counting.

[f] Includes passengers on private international flights. These passengers are not counted in airport deplanement data.

[g] Includes air travelers arriving at all airports other than Anchorage, Fairbanks, Juneau, and Ketchikan.

Arrivals by Mode of Entry

Table ES-3 shows the number of visitors that arrived in Alaska in Fall/Winter 2000-01, by mode of entry. The table also shows the percentage of visitors arriving by each mode.

Table ES-3. Visitor Arrival Summary for Sampled Entry Modes
Fall/Winter 2000-01

Mode of Entry	Visitors in Fall/Winter 2000-01	Percent of Total Visitor Arrivals
Cruise Ship	200	<1
Domestic Air	234,000	92.9
Ferry	1,600	<1
Highway – personal vehicle	10,800	4.3
Highway – Motorcoach	700	<1
International Air	4,700	1.9
Total Arrivals	**252,000**	**100**

Notes:

Totals may not sum due to rounding.

Table ES-1 shows a total of 254,500 visitors while Table ES-3 shows a total of 252,000 visitors. The difference is due to the fact that Table ES-3 shows visitors by sampled modes of arrival. Approximately 2,500 visitors arrived by other modes, such as commercial truck. The 2,500 visitors that arrive by other modes are included in certain tables to show as accurately as possible the total number of visitors that traveled to Alaska in Fall/Winter 2000-01 and their mode of entry. Visitor tallies and interviews, however, were conducted only with visitors arriving by way of a sampled mode.

Table ES-4 shows trends in visitor arrivals, by mode of entry, for the AVSP survey years since 1989. (Only AVSP survey years are shown because those are the years in which visitor tallies are conducted.)

Table ES-4. Visitor Arrivals Trends by Mode of Entry
Fall/Winter - AVSP Survey Years

Mode of Entry	Number of Visitors in AVSP Survey Years		
	1989-90	1993-94	2000-01
Cruise Ship	na	na	200
Domestic Air	146,900	167,100	234,000
Ferry	6,300	4,100	1,600
Highway – personal vehicle	10,900	8,600	10,800
Highway – Motorcoach	na	0	700
International Air	14,300	3,600	4,700
Subtotal	**178,400**	**183,500**	**252,000**
Other	na	7,000 [a]	2,500 [b]
Total Arrivals	**178,400**	**190,500**	**254,500**

Source: Data for 1993-94 from Alaska Visitor Statistics Program Alaska Visitor Arrivals Fall/Winter 1993-94 prepared for the State of Alaska, Department of Community and Economic Development by McDowell Group; data for 2000-01 collected by Northern Economics, Inc. for AVSP IV.

Notes:

na = category not appropriate in that survey year.

Numbers shown for 2000-01 have been rounded to the nearest 100.

[a] Includes unsampled (primarily arrivals at smaller airports).

[b] Derived by applying the overall visitor percentage (34%) to arrivals by commercial vehicles and pedestrians.

Table ES-5 shows the percentage of arrivals that are visitors, by mode of entry. While the total number of visitor arrivals increased from previous years, the relative number of arrivals by mode has been stable. For example, visitor tallies conducted in Fall/Winter 2000-01 suggest that 34 percent of the people that arrive in Alaska by domestic air are visitors. Visitor tallies conducted in Fall/Winter 1993-94 suggested that 33 percent of the people that arrived in Alaska by domestic air were visitors. These estimates are not statistically different. In fact, none of the visitor percentages for a given mode appear to be statistically different when comparing estimates from 1993-94 with estimates from 2000-01. (The visitor percentage for people arriving by ferry would appear to be very different in 1993-94 compared to 2000-01. However, the estimate of 32.6 percent in 1993-94 was based on a very small sample. That figure has a very large confidence interval and is most likely not statistically different from the estimate of 16 percent derived in 2000-01. In 2000-01, tallies were conducted at almost every sailing for the season.)

Table ES-5. Percentage of Arrivals that are Visitors, by Mode
Fall/Winter - AVSP Survey Years

Mode of Entry	Percent of Total Arrivals in AVSP Survey Years		
	1989-90	1993-94	2000-01
Cruise Ship	na	100	100
Domestic Air	36.4	33.0	34
Ferry	40.8	32.6	16
Highway – personal vehicle [a]	31.0	29.2	31
Highway – Motorcoach	No sample	No sample	50 [b]
International Air	87.5	48.1	49
Other	No sample	No sample	No sample
Total Arrivals	**38.0**	**33.0**	**34**

Source: Data for 1993-94 from Alaska Visitor Statistics Program Alaska Visitor Arrivals Fall/Winter 1993-94 prepared for the State of Alaska, Department of Community and Economic Development by McDowell Group; data for 2000-01 collected by Northern Economics, Inc. for AVSP IV.

Notes:

[a] The 2000-01 figure is based on highway arrivals at all border crossings and arrivals were adjusted for double counting (cars that arrive first by ferry and then, again, by highway). Figures in other years are based on arrivals at Tok and Skagway only and it is uncertain what steps were taken to adjust for double counting.

[b] Motorcoaches were not surveyed. The estimate of the percent of passengers comes from U.S. Customs officials, American Bus Association Alaska representatives, and the manager of the Visitors Center in Tok.

Table ES-6 shows the changes over time in the percentage of visitor arrivals by mode. This table shows that most visitors (over 90 percent) in Fall/Winter arrive by domestic air, and that the percentage of arrivals by domestic air has increased over time. The table also shows the decline over time in the percentage of arrivals by ferry, highway, and international air that are visitors. However, the relatively small declines in highway and ferry modes may not be statistically significant.

Table ES-6. Visitor Arrivals as a Percentage of Total Sampled Arrivals, by Entry Mode
Fall/Winter - AVSP Survey Years

Mode of Entry	Percentage of Visitor Arrivals in AVSP Survey Years		
	1989-90	1993-94	2000-01
Cruise Ship	na	NA	<1
Domestic Air	82.3	91.1	92.9
Ferry	3.5	2.2	<1
Highway – personal vehicle	6.1	4.7	4.3
Highway – Motorcoach	0.0	0.0	<1
International Air	8.0	2.0	1.9
Total Sampled Arrivals	**100**	**100**	**100**

Source: Data for 1993-94 from Alaska Visitor Statistics Program Alaska Visitor Arrivals Fall/Winter 1993-94 prepared for the State of Alaska, Department of Community and Economic Development by McDowell Group; data for 2000-01 collected by Northern Economics, Inc. for AVSP IV.

Notes:

Totals may not sum due to rounding.

na = category not appropriate in that survey year.

Arrivals by Trip Purpose

Table ES-7 shows the percentage of visitors arriving, by trip purpose in each of the AVSP survey years since 1989. A confidence interval of plus or minus only a few percent suggests that the percentage of visitors by trip purpose may not have changed since 1993-94.

Table ES-7. Percentage of Visitor Arrivals by Trip Purpose
Fall/Winter -AVSP Survey Years

Primary Trip Purpose	1989-90	1993-94	2000-01
Vacation and Pleasure	12.2	15.4	18.1
Visiting Friends & Relatives	21.3	22.2	25.5
Business and Pleasure	15.9	10.4	12.0
Business Only	47.8	49.5	44.4
Other [a]	2.8	2.5	<1

Source: data for 1993-94 from Alaska Visitor Statistics Program Alaska Visitor Arrivals Fall/Winter 1993-94 prepared for the State of Alaska, Department of Community and Economic Development by McDowell Group; data for 2000-01 collected by Northern Economics, Inc. for AVSP IV.

Notes:

Totals may not sum due to rounding.

[a] Includes seasonal workers in 1989-90 and 1993-94. Includes only visitors that said they did not know or that refused to answer in 2000-01. Visitor tallies in 2000-01 did not include seasonal workers as additional research would be needed to accurately determine the number of non-residents arriving on fishing vessels and chartered flights. (Visitor tallies in 1989-90 and 1993-94 kept track of seasonal workers that arrived by certain modes only. The decision in this report was to eliminate the category for seasonal workers, rather than report only a portion of the seasonal worker arrivals.)

Table ES-8 shows the number of visitors arriving, by purpose of trip, in each of the AVSP survey years since 1989. This information is the same as is shown in Table ES-7, but in terms of total numbers rather than percentages. Table ES-8 shows how important business only travelers are during the Fall/Winter season. There are nearly twice as many business only visitors as there are people visiting friends and relatives, and more than twice as many business only visitors as there are people traveling to Alaska for vacation and pleasure.

Table ES-8. Visitor Arrivals by Purpose of Trip
Fall/Winter – AVSP Survey Years

Mode of Entry	Number of Visitors in AVSP Survey Years		
	1989-90	**1993-94**	**2000-01**
Vacation and Pleasure	21,800	28,200	45,000
Visiting Friends & Relatives	38,000	40,800	64,000
Business and Pleasure	28,400	19,000	30,000
Business Only	85,200	90,900	111,000
Other [a]	5,000	4,600	4,500
Total Arrivals	**178,400**	**183,500**	**254,500**

Source: data for 1993-94 from Alaska Visitor Statistics Program Alaska Visitor Arrivals Fall/Winter 1993-94 prepared for the State of Alaska, Department of Community and Economic Development by McDowell Group; data for 2000-01 collected by Northern Economics, Inc. for AVSP IV.

Notes:

[a] Includes seasonal workers in 1989-90 and 1993-94. Includes only visitors that said they did not know or that refused to answer in 2000-01. Visitor tallies in 2000-01 did not include seasonal workers as additional research would be needed to accurately determine the number of non-residents arriving on fishing vessels and chartered flights. (Visitor tallies in 1989-90 and 1993-94 kept track of seasonal workers that arrived by certain modes only. The decision in this report was to eliminate the category for seasonal workers, rather than report only a portion of the seasonal worker arrivals.)

Prologue: The Alaska Visitors Statistics Program IV

The Alaska Visitors Statistics Program (AVSP) is a significant visitor industry research project conducted periodically by the State of Alaska. The AVSP provides the state and the visitor industry with critical data on the visitors that travel to Alaska. These data include information on the number of visitors, general demographic and other characteristics of the visitor population, as well as information on visitor expenditures, activities, and opinions.

The AVSP is managed by the State of Alaska, Division of Community and Business Development (formerly Division of Tourism)[4]. Northern Economics, Inc., NuStats International, and Klugherz and Associates assisted the State for the AVSP in 2000-01 (AVSP IV). This consultant team included the leading economic consulting firm in Alaska, an internationally recognized survey research firm, and the project manager for AVSP II and AVSP III.

AVSP Elements and Tasks

The AVSP includes several different data collection tasks and three surveys, as well as data analysis and report preparation. The three surveys include an initial intercept survey (the random arrival survey), an expenditure diary carried by survey respondents during their stay in Alaska (the visitor expenditure survey), and a follow-up opinion survey that participants complete once they have returned home from their trip (the visitor opinion survey). Separate reports summarize and explain the results of each of the three surveys. This report provides the results of the Random Arrival Survey (RAS).

Table P-1 identifies the various elements of the AVSP, including data collection tasks, surveys, and final reports.

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[4] The Division of Community and Business Development is within the Department of Community and Economic Development

Table P-1. AVSP – Project Components

Component	Description
Tallies	
Total Arrival Counts – Residents and Visitors Combined	To determine accurately the total number of people (residents and visitors combined) arriving in Alaska by each mode of travel for the study period.
Visitor Tallies	Collection of data on the number of visitors arriving in Alaska by each mode of travel for the study period.
Surveys	
Random Arrival Survey (RAS)	Personal intercept interview with visitors at their first point of entry to Alaska.
Visitor Expenditure Survey (VES)	Expenditure diary distributed to all visitors that complete the RAS; 14 or 28 day diary completed by visitors during their stay.
Visitor Opinion Survey (VOS)	Opinion survey mailed to all visitors that complete the RAS; mailed to visitors after they return home.
Reports	
Alaska Visitor Arrivals and Profile	Summary and analysis of total arrival and visitor arrival data, as well as general profile of visitor population based on data collected with the RAS.
Alaska Visitor Expenditures and Opinions [a]	Summary and analysis of visitor expenditure data (information on expenditures by visitor type, expenditure category, and region) and of visitor opinion data (information on trip planning, expectations, and opinions).

Notes:

[a] This is the first time the expenditure and opinion reports have been combined into a single report. They have been combined in AVSP IV to take advantage of the improved data collection process and richer dataset.

Purpose and Value

The primary purpose of the RAS is to collect the information needed to prepare a profile of the visitor population to Alaska. While conducting the intercept interviews, surveyors are also able to determine the percentage of people that are visitors to Alaska on randomly selected planes, boat, and cars arriving in Alaska. This tally of visitors, combined with the total arrival count data collected during the same period, supports an estimate of the number of visitors that arrive in Alaska by each mode of entry. Together, these data provide a wealth of information about visitors to Alaska – information that is useful to public agencies, private companies, and individuals interested in the tour and travel industry in Alaska.

The RAS includes questions on the size of the traveling party, as well as the age, gender, and other characteristics of each member in the party. The RAS also includes questions that help determine the number of visitors that are traveling independently, the number visiting friends and relatives, and the number traveling on a package vacation.

RAS data are also coded so they can be combined appropriately with the data from the other surveys. For example, the expenditure and opinion data collected with the VES and VOS, respectively, can be matched with the RAS data provided by the same traveling parties.

In the end, this report provides accurate estimates of the number of visitors traveling to Alaska in Fall/Winter, with a break down of visitor arrivals by mode of entry, purpose of trip, and type of travel. It provides accurate estimates of characteristics of the visitor population as a whole and by

major subgroup, including why people travel to Alaska, how they travel, and much more. It adds to the trends established in previous AVSP reports and provides the backdrop for understanding other statistics about the visitor population regarding their expenditure habits and opinions (contained in the companion report, *Alaska Visitor Expenditures and Opinions*).

Study Limitations

Despite the significant level of effort and amount of data collected, the scope of the data collection and analysis efforts are limited. For example, the RAS was not designed to do the following:

- Provide accurate information on visitors traveling to smaller communities in Alaska or from a particular place of origin (such as an individual state or country other than the U.S).

- Determine the extent to which visitors are aware of, prior to or at the beginning of their trip, the various tours and excursions that are available in Alaska.

- Provide significant information on previous trips to Alaska made by visitors (if applicable).

- Estimate the number of seasonal workers that travel to Alaska. (Previous AVSP visitor arrival reports provided estimates of the number of seasonal workers that arrived by selected modes. No attempt has ever been made in the AVSP to estimate the total number of seasonal workers who arrive by all modes.)

Surveys

Surveys are conducted with visitors arriving by all primary modes of travel, and data collection lasts for 12 months, with the fieldwork divided into two distinct seasons. Visitors are surveyed at their first point of entry to Alaska, or in some cases, at a selected point of departure as visitors embark on their trip to Alaska. More detail on arrival mode, data collection seasons, and survey locations follows.

Modes of Arrival

- Cruise Ship

- Domestic air

- Ferry (Alaska Marine Highway System)

- Highway (passenger vehicles)

- International air

Other modes of travel are possible and are considered in the collection of total arrival data. Other modes include arrival by motorcoach, commercial vehicle, private boat, and snowmobile.

Seasons

Data collection for the AVSP lasts for a full year. However, the year is divided into two distinct seasons:[5]

- Fall/Winter Season – October 1, 2000 through April 30, 2001

- Summer Season – May 1, 2001 through September 30, 2001

Roughly 70 percent of the survey work is done in the Summer season and 30 percent in the Fall/Winter season. More data are collected in the summer due to the fact that more visitors travel to Alaska in the summer. (In the past, roughly 5,000 RAS were distributed in each survey year, with approximately 3,500 distributed in Summer and 1,500 distributed in Fall/Winter. In AVSP IV, the number of RAS was increased to 5,300, with a similar distribution of surveys throughout the year.)

A complete set of reports (as shown in Table P-1) is prepared for both the Fall/Winter and Summer seasons. Spring is not mentioned in the title of either the Fall/Winter or Summer seasons because spring is technically in both the Fall/Winter and Summer seasons and due to convention (the seasons have always been described in this manner).

Method

Northern Economics, Inc., collected the arrival count data with assistance from numerous airlines, the Alaska Marine Highway System, U.S. Customs, and other organizations. Professionally trained surveyors located in Anchorage, Fairbanks, Tok, Haines, and Skagway, Alaska, as well as Prince Rupert, BC, Bellingham, WA, and Seattle, WA collected survey data and conducted the tallies to determine the number of residents and visitors arriving in Alaska by each mode of travel. Surveyors in all locations used Palm Pilot computers programmed with the Random Arrival Survey (RAS). Visitors mailed completed diaries and opinion surveys back to NuStats International, Inc. NuStats prepared the overall sampling plan for the survey effort, provided toll free numbers so that visitors participating in the AVSP could find assistance when needed, and completed all data coding and data entry tasks. Surveyors downloaded their survey data to NuStats on a weekly basis to facilitate monitoring and data entry.

Survey Locations

Visitors that participated in the AVSP in the past were always interviewed at their first point of entry to the state. For example, visitors arriving by air were interviewed at the airport where they deplaned, visitors arriving by cruise ship were interviewed at the first port of call in the state, and visitors arriving by ferry were interviewed on-board as they traveled to Ketchikan. Visitors participating in AVSP IV, however, where interviewed at points of arrival *or* selected points of departure (where a point of departure is the point where a visitor leaves *for* Alaska).

In previous years when the State of Alaska conducted the AVSP, visitors arriving in Alaska by domestic air carriers were intercepted in the jetways as they deplaned. However, new Federal Aviation Administration regulations made it impossible for the same approach to be used in AVSP IV. In addition, the "turn time" for aircraft is much shorter than it was in the past and the incidence of air traffic delays and cancelled flights are much higher. These changes make it much

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[5] Previous AVSP also defined the Summer Season as May - September and the Fall/Winter Season as October - April. Some reports refer to a Fall/Winter Season and other reports refer to just a Winter Season. In all cases, the season is October 1 through April 30.

more difficult to interview visitors as they arrive by air than it was in the past (because there is less time in which to conduct the interviews and a higher rate of rejection on the part of air travelers.

To adjust for these changes, the consultant team placed a survey team in Seattle. The surveyors in Seattle were able to interview passengers as they waited to board their flight to Alaska, giving the surveyors more time to explain the project and allowing visitors to participate in the project at a more convenient time.[6] During the Fall/Winter season, many flights to Alaska originate in Seattle. Alaska Airlines is the dominant air carrier to Alaska, with several flights each day originating in Seattle. In addition, Alaska Airlines has partnership arrangements with other airlines, such as Northwest, and passengers on those other airlines are routed to Seattle during the "off season" where they board an Alaska Airlines flight. Passengers on flights that originated in cities other than Seattle were interviewed at their first point of arrival in Alaska.

The consultant team also identified efficiencies with surveying ferry passengers and cruise passengers at the ports of departure, where passengers are waiting to board their vessel bound for Alaska. Surveyors were located in Bellingham, WA and Prince Rupert, B.C. (the two ports used by the Alaska Marine Highway System that are outside Alaska) to interview visitors traveling to Alaska by ferry and in Vancouver, B.C. and Seattle, WA to interview visitors traveling by cruise ship. Most of the cruise ships that serve Alaska homeport in Vancouver, B.C. One ship homeports in Seattle, WA. The new cruise ships used in the Alaska market are larger and have more gangways than in the past, allowing passengers to disembark more quickly. These changes make it difficult to intercept an adequate number of visitors in a courteous manner. The consultant team determined that these same visitors could be interviewed in a more relaxed manner at the port of departure. This change has no implications with regards to the type of visitors that might be interviewed, content of responses from visitors, or other factors.[7]

Table P-2 shows exactly where surveys were conducted for the different points of entry and modes considered in AVSP for Fall/Winter 2000-01.

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[6] It is unlikely that surveying in gate areas will be permitted in the future – especially after terrorism attacks on the Pentagon and the World Trade Center on September 11, 2001. Even prior to September 11, 2001, Port Authority personnel in Seattle said many airports were considering policies to prohibit surveying in the gate areas. As a result, survey research projects such as the AVSP will become more difficult to conduct in the future.

[7] One possible criticism of this approach is to say that certain people arrive early to wait for a boat or plane while others arrive at the last minute – suggesting that certain types of people would be more likely to be interviewed. To the extent that this criticism is valid, it is also true when conducting interviews at the point of arrival. For example, a visitor traveling to Alaska by domestic air may choose to arrive at the gate just as his or her plane is about to depart. This type of traveler would not be interviewed. However, this individual would likely be missed at the arrival airport as well. Imagine a business traveler who does not check baggage. When this person steps into the gate area or concourse, he or she is free to leave the airport and may not want to be interviewed. First, the change in FAA regulations that prevented surveyors from greeting visitors in the jetways had at least as big an impact on the type of visitors that might be interviewed. Second, not all interviews were conducted at points of departure for Alaska. Surveyors were still located at airports in Alaska to greet arriving passengers. (This criticism is not valid for visitors traveling by ferry or cruise ship as required check-in times can be several hours before sailing times.)

Table P-2. AVSP IV Survey Points
Fall/Winter 2000-01

Mode and Point of Entry Considered	Actual Survey Locations
Cruise Ship	
Various ports	No surveys in Fall/Winter
Domestic Air	
Anchorage	Anchorage, AK and Seattle, WA
Fairbanks	Fairbanks, AK and Seattle, WA
Juneau	Seattle, WA[a]
Ketchikan	Seattle, WA[a]
Sitka	Seattle, WA[a]
Other	Seattle, WA[a]
Ferry	
Ketchikan	Bellingham, WA and Prince Rupert, B.C. (ports of departure)[a]
Highway	
Beaver Creek/Tok	U.S. Customs Station on Alaska Highway
Haines	U.S. Customs Station on Haines Highway (Dalton Cache Station)
Skagway	U.S. Customs Station on Klondike Highway
Poker Creek	No surveys in Fall/Winter (highway closed)
International Air	
Anchorage	Anchorage, AK
Fairbanks	Fairbanks, AK

Notes:

[a] During the Fall/Winter season, flights to Juneau, Ketchikan, and Sitka from outside Alaska originate in Seattle. In addition, some flights to Anchorage and Fairbanks also originate in Seattle. As a result, surveyors located in Seattle can interview air passengers while those passengers wait at their departure gates (which is more convenient for the passengers than if they are interrupted while deplaning or collecting baggage). Flights to Juneau and Fairbanks in Fall/Winter are possible on Air North from Whitehorse in Yukon, B.C. Passenger data from Air North are included in the total arrival figures.

[b] Interviews with visitors arriving by ferry (and cruise ship in summer) were conducted as passengers boarded their vessels. This approach allowed surveyors to spend more time with visitors and to explain the importance of the AVSP.

Changes in AVSP IV

The State of Alaska conducted the first AVSP in 1985, with subsequent studies in 1989-90 and 1993-94. The current version, AVSP IV, builds on the work conducted in the past. Many elements of the surveys and the survey process were the same as in previous AVSP to ensure compatibility of data. The survey seasons are the same and many of the questions in the different surveys have been repeated. Still, changes in the visitor population and in the tour and travel industry required that the AVSP evolve over time. In addition, some survey techniques used in previous AVSP were no longer appropriate and some were not even allowed.

The following text provides a brief summary of the changes in AVSP IV compared to AVSP III. More detailed discussion on the different changes is provided in other sections of this report, as well as the *Alaska Visitor Expenditures and Opinions* report.

Larger sample size. The core AVSP sample for the full year was increased from 5,000 to 5,300. An additional 500 surveys dedicated to visitors traveling to rural areas were also added to the Summer season, for a total sample of 5,800 for AVSP IV. In addition, each completed survey in AVSP IV is for a traveling party. In previous AVSP, data were collected on individuals only. Collecting data on a traveling party increases significantly the amount of information collected (more is known about more visitors).

Visitor Expenditure and Visitor Opinion Surveys given to all participants. All visitors participating in AVSP IV receive a VES and VOS. In previous AVSP projects, half the participants received a VES and half received a VOS. (The approach was changed in AVSP IV to permit analysis of expenditure and opinion data from the same visitor population.)

A Single Expenditure and Opinion Report. AVSP IV is the first year that the expenditure and opinion data are presented in a single report. In previous years, the expenditure data was presented in one report and the opinion data in a separate report. The expenditure data and opinion data were kept separate in the past because different visitors (different subsets of the visitor population) completed the different surveys. In AVSP IV, the same individuals were asked to complete both of these surveys. As a result, the expenditure and opinion data are directly connected and it is possible to make numerous cross-references about expenditures and opinions. Such cross-references invite a single report.

Clear definition of entity being surveyed. In AVSP IV, surveys were given to traveling parties. In earlier versions of AVSP, surveys were given to individuals. The approach used in the past led to ambiguity in interpreting certain questions and/or responses. (In particular, it created uncertainty with visitor expenditure data.)

Additional survey locations. In addition to the survey locations used in AVSP III, Sitka was added to the list of locations for air arrivals, and Haines was added to the list of locations for highway arrivals.

Modified survey approach. For AVSP IV, surveyors were located at selected points of departure as well as at the traditional points of arrival. In this case, a point of departure is where visitors leave on a ferry, plane, or cruise ship on their way to Alaska. (For example, ferry passengers were interviewed in Bellingham, WA and Prince Rupert, BC rather than on-board the ferries as was done in AVSP III.)

Revised surveys. The State of Alaska, Department of Community and Business Development organized a steering committee with representatives from various state and federal agencies, as well as industry, to review and recommend changes to the three surveys used in AVSP IV.

New technology. Intercept surveys in AVSP IV were conducted on hand held Palm Pilot computers, with a program containing the RAS. Surveyors downloaded the data on a weekly basis to facilitate monitoring and data entry. No problems were encountered with the Palm Pilots due to weather or cold.

Web accessible data. Data collected during AVSP IV will be made available on the web by the State of Alaska, Department of Community and Economic Development. In previous AVSP studies, data were maintained in a proprietary database (not publicly available).

1 Introduction

This report summarizes a portion of the work conducted for the fourth Alaska Visitors Statistics Program (AVSP IV) and is the primary source of information on the number and type of visitors that came to Alaska in Fall/Winter 2000-01. Information for the report comes from total arrival data (residents and visitors combined), visitor counts at AVSP survey locations, and the results of 1,949 intercept surveys conducted from October 1, 2000 to April 30, 2001 at those same locations. (For comparison, 1,508 random arrival surveys were completed in Fall/Winter 1993-94.) Additional information from AVSP IV is provided in the companion *Alaska Visitor Expenditures and Opinions* report.

The major sections below (Section 2 and Section 3) present arrival data and a profile of the visitor population for the Fall/Winter season 2000-01. A copy of the random arrival survey used to collect much of the information is provided in Appendix D – Random Arrival Survey.

In addition to the general information on visitor arrivals, the report also provides demographic information for the overall visitor population. This information includes size of traveling parties, age of visitors, employment status of visitors, and their place of origin. Detailed arrival data are provided separately for visitors by purpose of trip (vacation and pleasure, visiting friends and relatives, business and pleasure, and business only), as well as for visitors arriving by domestic air.

2   Arrival Counts

Arrival data include total arrivals – residents and visitors combined – and visitor arrivals. Data on total arrivals provide the foundation for the estimates of visitor arrivals. (Total arrival figures come from U.S. Customs data at highway stations, airports and airlines, cruise lines, and the Alaska Marine Highway System.) More specifically, data on total arrivals combined with estimates of the percentage of people arriving in Alaska that are visitors permit estimates to be made of the total number of visitors.

Estimating the number of visitors that arrive in Alaska is a two-step process. The first step is to determine, for each mode of entry, the percentage of arrivals that are visitors. The second step is to calculate the number of visitors that arrive by each mode using properly weighted visitor percentages from the first step and the total arrival figures. The total number of visitors is simply the sum of the number of visitors that arrive by each mode. The properly weighted visitor percentages are used in subsequent years, along with new total arrival figures, to generate new visitor arrival estimates. These estimates are presented in the secondary arrival reports.

During the survey years, AVSP surveyors count the number of residents and visitors disembarking a particular flight, ferry, or cruise ship when it arrives in Alaska. They also count the number of residents and visitors crossing the border on the different highways in Alaska. In AVSP IV, surveyors also conducted tallies at ferry terminals, cruise terminals, and the Seattle airport (selected flights only) of travelers embarking on their trip to Alaska. These tallies yield estimates of the percentage of all people arriving in Alaska that are visitors, with estimates made separately for each mode of travel.

Total arrival data can be collected annually for each mode of arrival. However, the year in which the AVSP is conducted is the only opportunity to update the estimate of the percentage of people arriving in Alaska by each mode that are visitors. These visitor percentages are used to form the estimate of the number of visitors arriving in Alaska in non-survey years (when only secondary arrival studies are conducted). As such, trends in total arrivals have a direct impact on future estimates of the number of visitors traveling to Alaska.

2.1   Total Arrivals – Residents and Visitors Combined

Total arrival data are collected throughout the season for each mode of travel. Data come directly from the agency responsible for monitoring a particular mode of travel or entity that provides the service. For example, the U.S. Customs Service monitors all vehicles and people that cross the border into Alaska on highways, and the Alaska Marine Highway System (AMHS) keeps track of the passengers on AMHS ferries.

Data on the number of people arriving in Alaska by air is slightly more difficult to collect. Federal Aviation Administration and airport data on deplanements may or may not give an accurate picture of the number of people coming to the state because of intrastate flights. Since deplanement data do not include information on where each passenger boarded the flight, such data would give an accurate picture of the number of people entering the state only if each flight originated outside of Alaska and there was no continuing service from one city in Alaska to another. As a result, deplanement data are used in this analysis to estimate the number of people arriving in Alaska by air only for airlines that do not operate intrastate flights (those that operate interstate flights only). Airlines passenger load data are used for airlines that operate both interstate and intrastate flights. These airlines – primarily Alaska Airlines in the Fall/Winter, though there are others – provided passenger load data for all flights that originate Alaska.

Table 1 summarizes the sources of data for arrival counts.

Table 1. Sources of Data for Arrival Counts, AVSP IV
Fall/Winter 2000-01

Mode of Arrival	Source of Data for Arrival Counts
Cruise Ship	Cruise Line Agencies of Alaska, Northwest Cruiseship Association, and various cruise lines
Domestic Air	
Airlines with interstate and intrastate service	Airlines
Airlines without intrastate service	Airports (deplanement data for each airline)
Ferry	Alaska Marine Highway System
Highway	U.S Customs and Immigration Office, Anchorage Area Port Senior Inspector and border stations
International Air	Airports (deplanement data for each airline)

Table 2 shows the total number of residents and visitors (combined) entering Alaska, by mode and month for Fall/Winter 2000-01. It is important to note that these data have not been adjusted for individuals entering Alaska at more than one point on a single trip. For example, an individual would be counted as entering Alaska by ferry and by highway if that individual were to travel to Alaska from the Lower 48 or British Columbia, then drive from Haines or Skagway back into Canada, and finally reenter Alaska at Beaver Creek or Poker Creek.

Table 2. Total Arrivals – All Passengers Entering Alaska
Fall/Winter 2000-01
(Residents and Visitors Combined)

Mode	Oct-00	Nov-00	Dec-00	Jan-01	Feb-01	Mar-01	Apr-01	Season Total
Cruise Ship	0	0	0	0	0	0	189	**189**
Domestic Air	100,338	101,087	107,330	90,711	82,370	115,398	94,303	**691,537**
Ferry	1,428	1,133	1,361	903	1,168	1,611	1,915	**9,519**
Highway – personal vehicle [a]	8,193	5,022	4,072	4,742	4,633	7,265	12,420	**46,347**
Highway – motorcoach [b]	181	194	125	150	145	265	259	**1,319**
International Air	1,474	1,710	981	1,068	1,180	1,681	1,444	**9,538**
Other [c]	970	1,127	1,002	999	1,033	1,176	1,364	**7,671**
Total Arrivals	112,584	110,273	114,871	98,572	90,528	127,395	111,893	**766,120**

Sources: See Table 1

Notes:

[a] Includes passengers in personal vehicles entering Alaska on the Alcan, Haines, Klondike, and Taylor Highways. Earlier AVSP reports did not include figures for the Haines Highway.

[b] Includes passengers in motorcoaches entering Alaska on the Alcan, Haines, Klondike, and Taylor Highways. Earlier AVSP reports did not include figures for the Haines Highway.

[c] Includes passengers in commercial vehicles, pedestrians, and private international flights at small airports (including Haines, Skagway, and Ketchikan).

Data do not include crew on commercial fishing vessels, freighters, and other commercial ships but do include crew and processing facility workers (seasonal workers) arriving by air and other

modes). Customs officials and port directors state that arrivals on private vessels from foreign countries are negligible.

2.1.1   Trends in Total Arrivals

Table 3 shows the trends in arrivals by mode of entry. Data are shown for Fall/Winter 1993-94 (the last time the AVSP was conducted) and all intervening years for which arrival data are readily available. The State did not conduct an arrival count in 1999-2000.

Table 3. Trends in Total Arrivals (Residents and Visitors Combined)
Fall/Winter 2000-01
(Numbers Adjusted to Be Consistent with Methodology Used in Previous Years)

Mode	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99 [a]	2000-01
	AVSP III	Secondary Arrival Count Reports					AVSP IV
Cruise Ship				1,456	100	171	**189**
Domestic Air	506,198	540,407	522,257	588,021	528,441	551,934	**679,742** [b]
Ferry	12,603	10,069	10,679	9,621	7,480	9,540	**9,519**
Highway – personal vehicle [c]	29,494	31,271	31,327	30,638	36,109	32,840	**35,061** [d]
Highway – Motorcoach	610	484	452	518	518	935	**840** [e]
International Air	7,521	9,280	12,070	10,814	9,178	11,144	**9,538** [f]
Other	21,237	25,547	34,110	26,735	26,539	20,663	**19,466** [g]
Total Arrivals	**577,663**	**617,058**	**612,895**	**667,737**	**608,365**	**627,227**	**754.355**

Sources: Data for 1994-1999 from Arrival Count Reports and data for 1993-94 from Alaska Visitor Statistics Program Alaska Visitor Arrivals Fall/Winter 1993-94 prepared for the State of Alaska, Department of Community and Economic Development by McDowell Group; data for 2000-01 collected by Northern Economics, Inc. for AVSP IV. (State of Alaska reports active available on the web at http://www.dced.state.ak.us/econdev/research.htm; validity of address and access to reports confirmed Summer 2001.)

Notes:

[a] No arrival count conducted in 1999-2000.

[b] Figures in reports from 1993-1999 do not include arrivals at smaller airports such as Sitka and Kodiak (only arrivals at the largest four airports – Anchorage, Fairbanks, Juneau, and Ketchikan are included in the domestic air arrivals category). Arrivals at the smaller airports were included in the "Other" category. To permit easy assessment of trends, figures for 2000-01 (IN THIS TABLE ONLY) are presented in the same manner.

[c] Figures in reports from 1993 to 1999 do not include arrivals on the Haines Highway. As such, figures for 2000-01 are presented net of passenger activity on the Haines Highway. (Previous AVSP reports and arrival count reports in non-AVSP years do not identify passenger activity on the Haines Highway in the "Other" category.)

[d] 46,347 including arrivals on the Haines Highway. The methodology for double counting in AVSP III is unknown so no adjustment is made for double counting in this table for AVSP IV.

[e] 1,319 including arrivals on the Haines Highway. The methodology for double counting in AVSP III is unknown so no adjustment is made for double counting in this table for AVSP IV.

[f] Includes passengers on private international flights. These passengers are not counted in airport deplanement data and it is not clear if they were included in past AVSP or arrival count reports.

[g] Includes air travelers arriving at all airports other than Anchorage, Fairbanks, Juneau, and Ketchikan.

When assessing trends in arrivals by mode, it may be important to note improvements in methodology and increases in the scope of the AVSP research effort. For example, as the number of visitors traveling to Alaska has increased, it has become necessary to count and to interview visitors in more locations.

All of the arrival count figures for Fall/Winter 2000-01 are consistent with official arrival data from state and federal agencies.

Table 4 shows the trend in highway arrivals based on data from the U.S. Customs Service. Data are presented with and without arrival figures for the Haines Highway. Data in the tables are <u>not</u> adjusted for double counting.

Table 4. Highway Arrivals
Fall/Winter 1997-98 to 2000-01
(Residents and Visitors Combined)

Passenger Category	1997-98	1998-99	1999-2000	2000-01
All Border Crossings				
Personal Vehicles	48,126	44,331	47,539	46,347
Motorcoach	1,413	2,034	1,824	1,319
Alcan, Klondike, and Poker Creek Stations <u>Only</u>				
Personal Vehicles	37,240	34,104	36,230	35,061
Motorcoach	622	984	1,438	840

Source: U.S Customs Service, Anchorage Area Port Senior Inspector.

These data are provided because data in the arrival count reports for Fall/Winter 1997-98 and 1998-99 do not match the data from the U.S. Customs Service and because no arrival count report was prepared for Fall/Winter 1999-2000. The figures in Table 4 help place the AVSP IV numbers in the proper context.[8]

Table 5 shows ferry arrivals for the Fall/Winter season from 1997-98 to 2000-01. Figures in the arrival count reports for Fall/Winter 1997-98 and 1998-99 are consistent with data from the Alaska Marine Highway System (AMHS). These ferry arrival data are presented because no arrival count was conducted for 1999-2000 and a complete set of data are not readily available in another document.

Table 5. Ferry Arrivals
Fall/Winter 1997-98 to 2000-01
(Residents and Visitors Combined)

Port of Departure	1997-98	1998-99	1999-2000	2000-01
Bellingham, WA	5,764	5,761	5,053	**5,697**
Prince Rupert, B.C.	1,716	3,773	3,854	**3,822**
Total	**7,480**	**9,534**	**8,907**	**9,519**

Source: Alaska Marine Highway System (AMHS).

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[8] The notes in the Arrival Count reports prepared for the State in Fall/Winter 1997-98 and 1998-99 indicate that highway arrivals are not adjusted for double counting, so it is not clear why the figures do not match the data from the U.S. Customs Service.

2.1.2 Adjustments to Total Arrivals

Data on the number of people (residents or visitors) who enter Alaska at more than one location on the same trip are very limited. When conducting the intercept surveys (RAS surveys), surveyors ask each visitor if the place where the interview is conducted is the visitor's first point of entry. As a result, AVSP data includes information on the number of visitors that enter Alaska at multiple locations on a single trip. However, the sample size is too small to support a credible estimate of the degree to which people are double counted at different points of entry.

The Port Director at the Alcan station estimates that 60 to 70 percent of the people entering Alaska by private vehicle on the Alcan Highway in Fall/Winter have just disembarked the ferry in Haines and driven north. The Port Director at the Haines station estimates that 70 to 80 percent of the people entering Alaska on the Haines Highway in Fall/Winter are traveling directly to the ferry, and that most of those travelers are visitors. These visitors include Canadians entering Alaska for the first time on that particular trip, but also visitors who are actually leaving Alaska. This anecdotal evidence suggests that highway and ferry arrival figures should not be added together when estimating total arrivals. Instead, only a portion of highway travelers arriving in Alaska – those thought to be traveling by highway only - should be added to the number of ferry travelers to determine the total number of ferry and highway arrivals. Responses to RAS questions about first point of entry are not sufficient to determine with any precision the degree to which this double counting might occur because the sample plan and survey were not designed to collect this information. (That is, a larger survey effort with additional questions would be needed to estimate accurately the number of people entering Alaska at different locations that might be double counted.)

Table 6 shows the likely number of people arriving in Alaska, by month, by ferry and road. Less than 100 percent of highway travelers are counted as arrivals because a portion of those travelers were also ferry passengers and these travelers should not be double counted. A more detailed discussion on the methodology used to correct for double counting in this report is presented in Appendix B – Adjusting Highway and Ferry Arrivals.

Table 6. <u>Adjusted</u> Arrivals by Ferry and Highway
Fall/Winter 2000-01
(Residents and Visitors Combined)

Mode of Arrival	Oct-00	Nov-00	Dec-00	Jan-01	Feb-01	Mar-01	Apr-01	Season Total
Ferry – actual counts	1,428	1,133	1,361	903	1,168	1,611	1,915	**9,519**
Highway, personal vehicle – adjusted	6,000	3,500	2,900	3,500	3,400	5,800	9,200	**34,300**
Highway, motorcoach – actual counts	181	194	125	150	145	265	259	**1,319**
Total Arrivals - Adjusted	**7,600**	**4,800**	**4,400**	**4,600**	**4,700**	**7,700**	**11,400**	**45,100** [a]

Source: Alaska Marine Highway System and U.S. Customs Service. Adjusted highway numbers equal 40 percent of arrivals at Tok and 95 percent of arrivals at Haines(rounded to nearest 100) of highway counts. These adjustments are based on estimates from individual border station managers regarding the percent of highway entries at Tok and Haines that are not true arrivals or first point of entry. (Personal communication with Port Director Douglas Harmon at the Alcan station, Port Director Judy Ewald at the Dalton Cache station, and Linda Robinson, Supervisor at the Klondike Highway station.)

Notes:

[a] Figure is monthly adjusted totals, each of which is rounded to the nearest 100.

Highway arrivals at Haines and Skagway (Klondike Highway) are not adjusted because people arriving in Alaska at those points would not have been counted at other locations. People arriving at Haines and Skagway by highway may drive straight to the ferry, but would still be in Alaska on the ferry for several days and could be disembarking at other locations in Alaska. As a result, only the highway arrivals at Beaver Creek (Alcan Highway) are adjusted.

Table 7 shows total arrivals, with ferry and highway arrivals adjusted for double counting and numbers rounded to the nearest 100.

Table 7. <u>Adjusted</u> Total Arrivals
Fall/Winter 2000-01
(Residents and Visitors Combined)

Mode	Oct-00	Nov-00	Dec-00	Jan-01	Feb-01	Mar-01	Apr-01	Season Total
Cruise Ship	0	0	0	0	0	0	200	**200**
Domestic Air	100,300	101,100	107,300	90,700	82,400	115,400	94,300	**691,500**
Ferry & Highway - private vehicles [a]	7,600	4,600	4,300	4,400	4,600	7,600	11,200	**44,300**
Highway - motorcoach	200	200	100	200	100	300	300	**1400**
International Air [b]	1,500	1,700	1,000	1,100	1,200	1,700	1,400	**9,600**
Other	1,000	1,100	1,000	1,000	1,000	1,200	1,400	**7,700**
Total Arrivals	**110,600**	**108,700**	**113,700**	**97,399**	**89,400**	**126,300**	**109,100**	**754,700**

Notes:

[a] Figures adjusted for double counting. Includes passengers in personal vehicles entering Alaska on Alcan, Haines, Klondike, and Taylor Highways. Earlier AVSP reports did not show figures for the Haines Highway.

[b] Includes passengers on private international flights

2.1.3   Trends in Total Arrivals: Looking Forward

With the increases in arrivals at different locations in Alaska and improvements in data management by state and federal agencies, it is possible to refine the definitions of arrival categories and methodologies. For example, there is no reason to continue reporting highway arrivals net of arrivals on the Haines Highway or to continue combining domestic air arrivals at smaller airports with arrivals from other modes. (Arrivals at smaller airports may need to be aggregated for confidentiality. If arrivals by air at smaller airports cannot be reported as a single figure, then they should be shown with arrivals by air at larger airports. The table below shows domestic air arrivals separately for Anchorage and other locations.)

Table 8 presents arrival categories that can be used in the future and the corresponding arrival figures for the Fall/Winter season, 2000-01.

Table 8. Category Definitions and Total Arrivals
Fall/Winter 2000-01

Arrival Category	Definition	Arrivals in 2000-01
Cruise Ship	All cruise ship arrivals	200
Domestic Air - Total	All arrivals on flights operated by domestic (U.S.) carriers that originate outside the state of Alaska	691,500
Domestic Air - Anchorage Only		552,500
Ferry	All ferry arrivals	9,500
Highway – personal vehicle	All highway arrivals, adjusted for double counting	34,800
Highway – Motorcoach	All highway arrivals, adjusted for double counting	1,400
International Air	All arrivals on flights that originate outside the U.S.	9,600
Other	Pedestrian, passengers on commercial vehicles, and other [a]	7,700
Total Arrivals		**754,700**

Notes:

Rounded to the nearest hundred.

[a] Does not include persons on commercial freighters and fishing vessels.

2.2 Visitor arrivals

Visitor arrival data are presented in a variety of ways to make the report as useful as possible to many different readers. In addition, every effort has been made to extend the trends in visitor arrivals established in earlier AVSP reports.

Visitor arrivals are based on tallies conducted by surveyors at all AVSP survey locations throughout the season. When conducting tallies, surveyors ask travelers at the border stations, as they deplane, as they disembark a ship, and in certain locations where they embark on their trip to Alaska whether they are a resident of Alaska or a visitor. Prior to being used in an analysis of the visitor population, these tallies must be weighted to reflect the amount of sampling that was conducted in each location, the total number of arrivals at the different points of entry, and other factors. The following subsection (Section 2.2.1) summarizes the weighting process and the subsequent subsection (Section 2.2.4) presents the visitor count data by mode and trip purpose.

2.2.1   Statistical Weights and Visitor Percentages

In addition to the total arrival data and tallies conducted by surveyors, statistical weights must be calculated to make the tally information truly useful. For example, the tally sheets completed by the surveyors show the percentage of the people arriving in Alaska, by mode, that are visitors. Those figures cannot be applied directly to the total arrival data without consideration of the number of tallies conducted, the relative number of people traveling by that mode at different times of the season, and other factors.

In addition, responses to many survey questions must be weighted to account for the fact that visitors traveling by different modes may respond differently to a given question. For example, ferry travelers may respond more often than air travelers that they intend to depart Alaska by ferry. If responses are not weighted to reflect the fact that many more Fall/Winter visitors arrive by air than by ferry, then the response would overstate the likelihood with which a visitor would depart by ferry. As a result, responses are weighted to account for the mode of arrival of the respondent and the relative number of visitors that arrive by that mode.

The weighted visitor percentages are based the weights on the unadjusted arrival estimates since it is uncertain how the arrival estimates were adjusted in previous AVSP reports, and because the consultant team has significantly more confidence in the unadjusted estimates. The adjustments for double counting are not documented and there is no established methodology for determining the percent of people that, for example, get off the ferry in Haines and drive into Alaska, and enter Alaska again at Beaver Creek as transit the Alcan Highway. Without further study it is also difficult to determine how accurately people answered the question, "Is this your first point of entry?" Until more information is available it was considered prudent to use the unadjusted figures.

With the exception of the highway mode, where most of the potential double counting occurs, differences between the adjusted and unadjusted weighted visitor percentages are generally less than 1 percent. For highway mode, use of adjusted visitor estimates would result in a change of about one percent or less. Information on unadjusted and adjusted arrival estimates are presented in the report and readers can use these estimates to make any adjustments they think would add value and better address their needs.

2.2.2   Accuracy of Visitor Arrival Estimates

Estimates of the number of visitors arriving in Alaska are based on the tallies conducted by the surveyors. The tallies are counts of passengers on a random selection of planes, ferries, and cars to determine the residency status of people on those planes, ferries, and cars. As a result, the accuracy of the counts depends on the number of people included in the tallies, the number of total arrivals, and the estimated percentage of arrivals that are visitors. The accuracy of visitor counts does not depend on the number of random arrival surveys conducted.

The survey team for AVSP IV conducted 485 tallies, making contact with over 35,000 people as they arrived in Alaska (residents and visitor combined). These tallies permit accurate estimates of total visitor arrivals and accurate estimates of arrivals for each mode of entry. The variance surrounding the arrival estimates range from +/- 1 percent to +/- 4 percent depending on whether the estimate is for all visitors for the season or for a subgroup of the visitor population. Additional information on the margins of error surrounding the estimates is provided in Appendix C – Margins of Error.

2.2.3   Visitor Percentages

Table 9 shows the percentage of total arrivals estimated to be visitors by each mode of entry. Figures are given for Fall/Winter 2000-01, 1993-94, and 1989-90. The last two times surveys were conducted and visitor percentages could be calculated were in 1993-94 and 1989-90.

Table 9. Percentage of Arrivals that are Visitors, by Mode
Fall/Winter - AVSP Survey Years

Mode of Entry	1989-90	1993-94	2000-01
Cruise Ship	Na	100	100
Domestic Air	36.4	33.0	34
Ferry	40.8	32.6	16
Highway – personal vehicle [a]	31.0	29.2	31
Highway – Motorcoach	No sample	No sample	50 [b]
International Air	87.5	48.1	49
Other	No sample	No sample	No sample
Total Arrivals	**38.0**	**33.0**	**34**

Sources: Data for 1994-1999 from Arrival Count Reports and data for 1993-94 from Alaska Visitor Statistics Program Alaska Visitor Arrivals Fall/Winter 1993-94 prepared for the State of Alaska, Department of Community and Economic Development by McDowell Group; data for 2000-01 collected by Northern Economics, Inc. for AVSP IV.

Notes:

na = not appropriate (no sailings)

[a] Adjusted for double counting.

[b] Motorcoaches were not surveyed. The estimate of the percent of passengers comes from U.S. Customs officials, American Bus Association Alaska representatives, and the manager at the Visitors Center in Tok.

While the percentage of visitors arriving by mode may appear to differ from one survey year to the next, there is little to no real difference. Each of the estimates has a certain amount of uncertainty associated with it and the amount of uncertainty is greater than the difference in estimates from one year to the next.

The only estimate that appears to differ between 1993-94 and 2000-01 is the percentage of ferry arrivals believed to be visitors. The estimate for 2000-01 is based on weekly tallies of passengers boarding ferries at Bellingham, WA and Prince Rupert, B.C. The estimate for 1993-94 was based on fifteen tallies conducted on board the vessels over the entire season. The small number of tallies conducted in 1993-94 suggests that the visitor percentage for that year may have a large degree of uncertainty. The fact that surveyors counted such a large percentage of ferry passengers in 2000-01 suggests that the estimate for that year is more reliable.

2.2.4   Visitor Arrival Tables

As noted in the discussion on total arrivals, certain points of entry into Alaska that were not included (for a variety of reasons) in previous years have been considered in AVSP IV. For example, visitors arriving by domestic air in Sitka were included in the sampling process in AVSP IV, as were visitors arriving at many other smaller cities. In addition, highway arrivals now include arrivals in Haines. (Visitors arriving by highway at Haines were not counted in previous AVSP.)

Table 10 shows visitor arrivals (Fall/Winter season) by mode of entry for all years since 1993. Figures in 1993-94 and 2000-01 are based on tallies conducted by AVSP surveyors. Figures in the intervening years were based on the tallies conducted in 1993-94 and total arrival data (residents and visitors combined) for each year. Figures in 2000-01 have been rounded to the nearest 100.

Table 10. Trends in Visitor Arrivals by Mode of Entry
Fall/Winter 2000-01

Mode of Entry	1993-94 AVSP III Survey Year	1994-95	1995-96	1996-97	1997-98	1998-99 [a]	2000-01 AVSP IV Survey Year
		Figures Based on Visitor Percentages From AVSP III, 1993-94					
Cruise Ship	na	na	na	1,500	100	200	**200**
Domestic Air	167,126	172,100	177,600	202,900	181,500	189,600	**234,000**
Ferry	4,109	3,400	3,600	3,200	2,500	3,100	**1,600**
Highway – personal vehicle	8,625	10,600	11,300	10,100	12,400	11,300	**10,800**
Highway – Motorcoach	0	na	na	0	0	0	**700**
International Air	3,618	4,500	5,900	5,200	4,400	5,300	**4,700**
Other	7,008	na	9,700 [b]	7,600	8,700	6,800	**2,500 [c]**
Total Arrivals	**190,486**	**190,600**	**208,100**	**230,500**	**209,600**	**216,300**	**254,500**

Source: Data for 1993-94 from Alaska Visitor Statistics Program Alaska Visitor Arrivals Fall/Winter 1993-94 prepared for the State of Alaska, Department of Community and Economic Development by McDowell Group; data for 2000-01 collected by Northern Economics, Inc. for AVSP IV. Copies of reports from 1997-1999 are available on on-line at http://www.dced.state.ak.us/econdev/research.htm (address confirmed Summer 2001). Reports for 1993-1996 were provided by the State of Alaska, Department of Community and Economic Development.

Notes:

na = no data provided or no reference found.

[a] No arrival count conducted in 1999-2000.

[b] Visitor arrivals by "Other" in 1995-96 were taken from the 1996-97 report. The "Other" category was not included in the analysis in the 1995-96 report, but was provided ex poste (for 1995-96) in the 1996-97 report.

[c] The overall average percentage of visitors for each mode (34%) was applied to total Other arrivals to obtain an estimate of 2,500 (Other is primarily passengers in commercial vehicles, but also includes pedestrians and passengers on snow mobiles).

Table 11 shows the percentage of visitors arriving by each mode. Figures are provided for each of the last three survey years to show trends in the mode of entry for visitors.

Table 11. Percentage of Total Arrivals, by Mode of Entry
Fall/Winter - AVSP Survey Years

Mode of Entry	Percentage of Visitors		
	1989-90	1993-94	2000-01
Cruise Ship	na	NA	<1
Domestic Air	82.3	91.1	92.9
Ferry	3.5	2.2	<1
Highway – personal vehicle	6.1	4.7	4.3
Highway – Motorcoach	0.0	0.0	<1
International Air	8.0	2.0	1.9
Total Sampled Arrivals	**100**	**100**	**100**

Sources: Data for 1994-1999 from Arrival Count Reports and data for 1993-94 from Alaska Visitor Statistics Program Alaska Visitor Arrivals Fall/Winter 1993-94 prepared for the State of Alaska, Department of Community and Economic Development by McDowell Group; data for 2000-01 collected by Northern Economics, Inc. for AVSP IV.

Notes:

Totals may not sum due to rounding.

na = category not appropriate in that survey year.

The percentage of visitors arriving by each mode in Fall/Winter 2000-01 is very similar to the percentages estimated in Fall/Winter 1993-94

3   Visitor Profile

The following information is based on the results of 1,949 completed random arrival surveys. Due to the fact that surveys were given to different traveling parties and information requested for the entire traveling party, the 1,949 surveys actually provide information on 2,547 visitors to Alaska (traveling to Alaska between October 1, 2000 and April 30, 2001).

3.1.1   Margins of Error

When a large number of statistics are generated – such as those in this report – it is often useful to report generalized margins of error for the reader/analyst. In general, the margin of error for statistics in this report is +/-1.2 percent at the 90 percent confidence level and +/-2.3 percent at the 95 percent confidence level. Statistics that describe smaller subsets of the visitor population have a higher margin of error than do statistics for the visitor population as a whole. For example, estimates of the trip purpose for visitors that arrived by a particular mode in Fall/Winter 2000-01 can have margins of error as high as +/- 6.9 percent (at the 90 percent confidence level), while estimates of the trip purpose for all visitors have a margin of error of +/- 1.2 percent (also at the 90 percent confidence level).

The margins of error for statistics in this report are similar to the true margins of error for statistics found in previous reports.[9] Appendix C – Margins of Error provides additional information on margins of error.

3.2   Visitor Profile Tables

Table 12 shows the number of visitors arriving, by purpose of trip, in each of the AVSP survey years since 1989. Mary – add footnote that references additional survey locations

Table 12. Visitor Arrivals by Purpose of Trip
Fall/Winter - AVSP Survey Years

Primary Trip Purpose	Number of Visitors		
	1989-90	1993-94	2000-01
Vacation and Pleasure	21,800	28,200	46,000
Visiting Friends & Relatives	38,000	40,800	65,000
Business and Pleasure	28,400	19,000	30,000
Business Only	85,200	90,900	113,000
Other [a]	5,000	4,600	500
Total Arrivals	178,400	183,500	254,500

Source: Data for 1993-94 from Alaska Visitor Statistics Program Alaska Visitor Arrivals Fall/Winter 1993-94 prepared for the State of Alaska, Department of Community and Economic Development by McDowell Group; data for 2000-01 collected by Northern Economics, Inc. for AVSP IV.

Notes:

[a] Includes seasonal workers in 1989-90 and 1993-94. Includes only visitors that said they did not know or that refused to answer in 2000-01. Visitor tallies in 2000-01 did not include seasonal workers as additional

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[9] The margins of error presented in previous reports were valid only for statistics that related to the visitor population as a whole. Statistics related to different segments of the visitor population have a higher margin of error than shown in the reports.

research would be needed to accurately determine the number of non-residents arriving on fishing vessels and chartered flights. (Visitor tallies in 1989-90 and 1993-94 kept track of seasonal workers that arrived by certain modes only. The decision in this report was to eliminate the category for seasonal workers, rather than report only a portion of the seasonal worker arrivals.)

Table 13 shows the percentage of visitors by trip purpose. Visitor counts are presented as a percent of total to show the trend over time.

Table 13. Percentage of Visitor Arrivals by Trip Purpose
Fall/Winter - AVSP Survey Years

Primary Trip Purpose	1989-90	1993-94	2000-01
Vacation and Pleasure	12.2	15.4	18.1
Visiting Friends & Relatives	21.3	22.2	25.5
Business and Pleasure	15.9	10.4	12.0
Business Only	47.8	49.5	44.4
Other [a]	2.8	2.5	<1

Source: Data for 1993-94 from Alaska Visitor Statistics Program Alaska Visitor Arrivals Fall/Winter 1993-94 prepared for the State of Alaska, Department of Community and Economic Development by McDowell Group; data for 2000-01 collected by Northern Economics, Inc. for AVSP IV.

Notes: Totals may not sum due to rounding.

[a] Includes seasonal workers in 1989-90 and 1993-94. Includes only visitors that said they did not know or that refused to answer in 2000-01. (Visitor tallies in 2000-01 did not include seasonal workers, as additional research would be needed for such "visitors" arriving on fishing vessels and chartered flights.)

Figure 1 shows the same information as Table 13, but in graphical form to show more clearly the trends in trip purpose.

Figure 1. Percentage of Visitor Arrivals by Trip Purpose
Fall/Winter - AVSP Survey Years
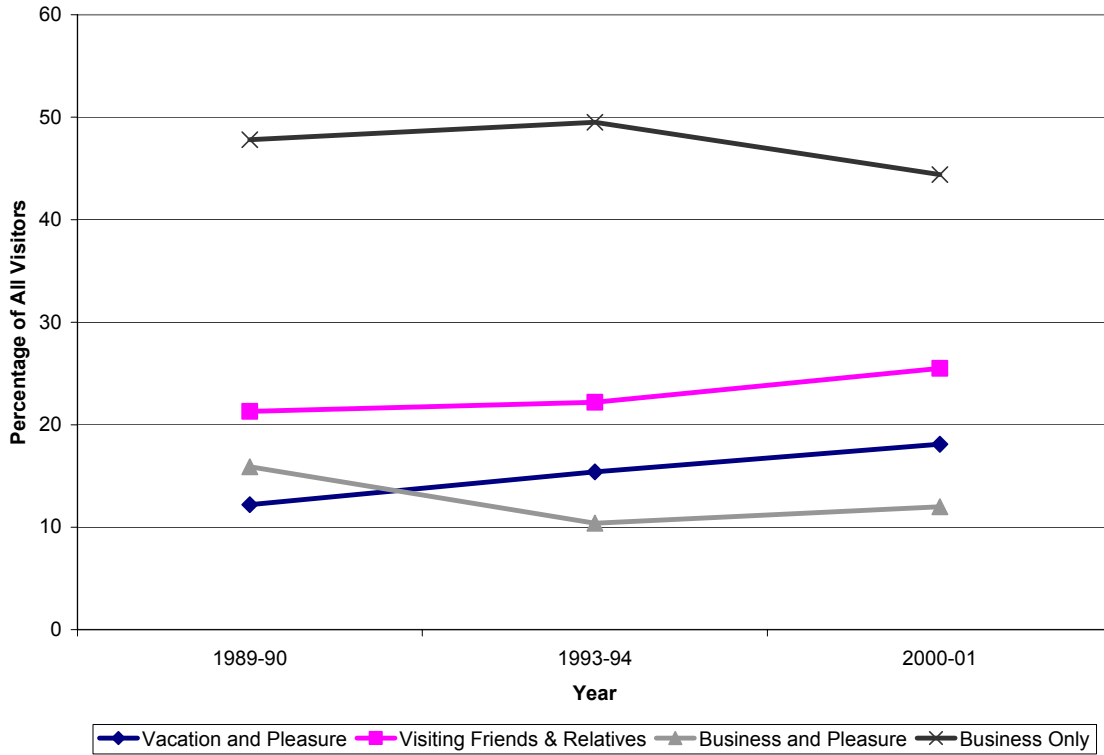
Table 14 shows the mode of arrival for visitors, with visitors divided into the purpose of trip categories. Cruise is not included in the table as a mode of arrival because of the extremely small volume and the fact that no interviews were conducted with cruise passengers. (Cruise is a major category in the summer season and is fully analyzed in the summer season reports.)

Table 14. Trip Purpose, by Mode of Entry
Fall/Winter 2000-01

Primary Trip Purpose	Visitor Percentages, by Mode of Entry			
	Domestic Air	Intern'l Air	Ferry	Highway
Vacation and Pleasure	16	17	51	51
Visiting Friends & Relatives	26	37	30	10
Business and Pleasure	11	39	9	22
Business Only	46	8	10	17
Total	100	100	100	100

Note:

Totals may not sum due to rounding.

Figure 2 shows the same information as Table 14, but in graphical form.

Figure 2. Trip Purpose, by Mode of Entry
Fall/Winter 2000-01
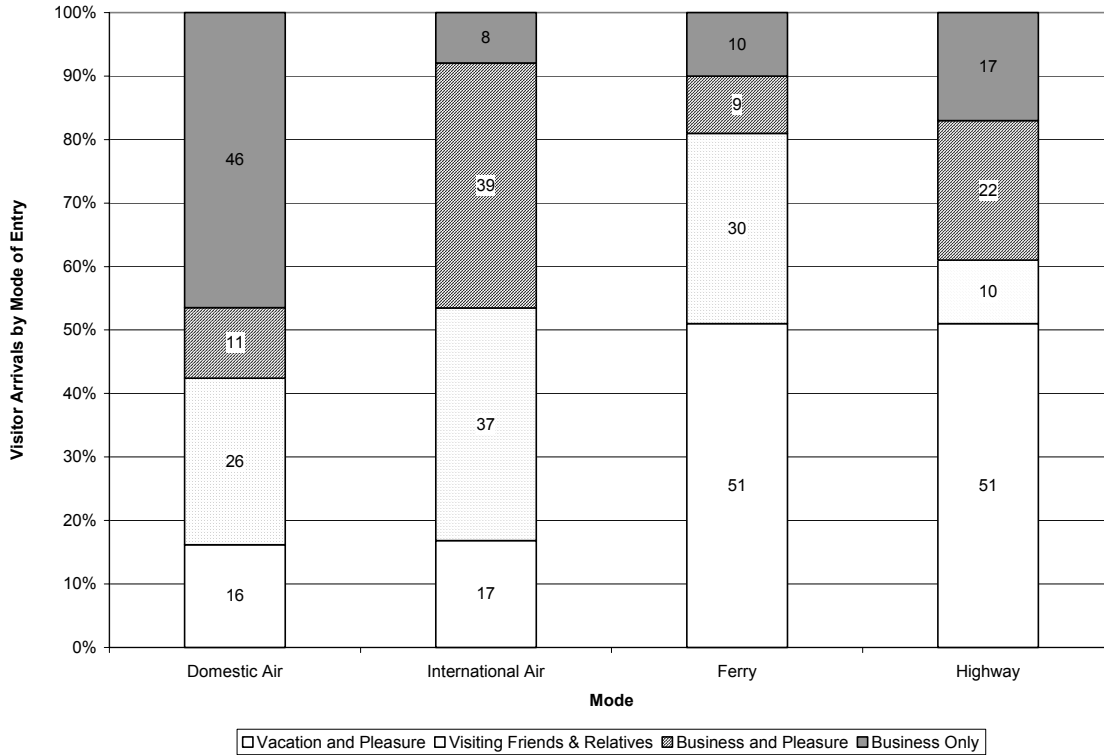
Table 15 shows the percentage of visitors, by purpose of trip, with visitors divided into categories for mode of entry.

Table 15. Mode of Entry for Visitors, by Trip Purpose
Fall/Winter 2000-01

	Percent of Arrivals, by Trip Purpose			
Mode of Entry	**Vacation and Pleasure**	**Visiting Friends & Relatives**	**Business and Pleasure**	**Business Only**
Domestic Air	85	96	87	98
International Air	1	2	5	<1
Ferry	2	<1	<1	<1
Highway	12	2	8	2
Total	100	100	100	100

Note:

Totals may not sum due to rounding.

Table 16 shows the intended length of stay for all visitors. Information on the intended length of stay for visitors, by purpose of trip, is provided in the separate profiles below.

Table 16. Intended Length of Stay for All Visitors

Length of Visit	Percent of All Visitors
7 days or less	53
8 – 14 days	25
15 – 30 days	14
More than 30 days	7
Unknown or refused to answer	<1
Total	**100**

Note:

Totals may not sum due to rounding.

Table 17 provides a summary of the age, gender, and employment status of visitors. Data are provided for all visitors, as well as for visitors by mode of arrival. Might want to format the category column so that the subheadings (i.e. age groupings) are slightly indented.

Table 17. Age, Gender, and Employment Status of Visitors
Fall/Winter 2000-01

		Percent of All Visitors, by Mode of Arrival			
Category	Percent of All Visitors	Domestic Air	International Air	Ferry	Highway
Age (years)					
Less than 21	7	7	5	7	7
21 – 30	19	19	18	15	17
31 – 40	28	28	24	13	15
41 – 50	21	21	18	16	16
51 – 60	15	14	18	20	21
61 and over	11	10	18	29	23
Gender					
Male	59	59	61	59	61
Female	41	41	39	41	39
Employment					
Employed full-time	71	73	70	41	49
Employed part-time	6	5	0	6	12
Unemployed	1	1	0	10	4
Student	7	7	3	5	4
Retired	9	8	12	34	22
Other/Refused	6	6	16	6	9

Note:

Totals may not sum due to rounding.

Table 18 shows the trend in the gender of visitors traveling to Alaska in Fall/Winter.

Table 18. Trend in Gender of Visitors
Fall/Winter 1993-94 and 2001-01

Gender	1993-94	2000-01
	(Percent of Visitors)	
Male	66	59
Female	34	41

Table 19 shows the trend in employment status of visitors traveling to Alaska in Fall/Winter.
[4]

Table 19. Trend in Employment Status of Visitors
Fall/Winter 1993-94 and 2001-01

Employment Status	1993-94	2000-01
	(Percent of Visitors)	
Employed	78	77
Retired	8	9
Other [a]	12	14

Notes:

Totals may not sum due to rounding.

[a] Other includes students, homemakers, unemployed, and individuals who refused to answer.

Table 20 shows the size of traveling parties in the Fall/Winter season, 2000-01. Data are provided for all visitors, as well as for visitors by mode of arrival.

Table 20. Size of Traveling Party
Fall/Winter 2000-01

Number in Party	Percent of All Visitors	Percent of All Visitors, by Mode of Arrival			
		Domestic Air	Int'l Air	Highway	Ferry
One	76	73	1	<1	2
Two	19	17	<1	<1	2
Three	3	2	<1	<1	<1
Four	2	2	<1	<1	<1
Five or more	0	0	0	0	0

Notes:

Numbers in mode columns should add or sum to numbers in All Visitors column. Differences are due to rounding.

Table 21 shows the percentage of visitors traveling to Alaska in Fall/Winter 2000-01 who had previously visited Alaska.

Table 21. Percent of Repeat Visitors

	Previously Visited Alaska	**First Trip to Alaska**
Percent of All Visitors	57	44

Note:

Percentages may not add to 100 due to rounding.

Table 22 shows the level of income for visitors in Fall/Winter 2000-01.

Table 22. Visitor Income
Fall/Winter 2000-01

Income Level	**Percent of Visitors in Category**
Under $25,000	7
$25,000 to $49,999	15
$50,000 to $74,999	19
$75,000 to $99,999	15
$100,000 and above	18
Refused to answer	26

Note:

Percentages may not add to 100 due to rounding.

The refusal rate of 26 percent with the question regarding income was noticeable. Surveyors sometimes handed the palm pilot to the respondent to let them answer this question (enter their income level) in private. This approach made some people comfortable enough to answer the question, but not everyone. Many visitors still said this information was private.

During the RAS, visitors were also asked whether they were independent travelers, if they intended to purchase a commercially available tour (such as a sightseeing or wildlife viewing tour), or if they had purchased a package that included all elements of their trip. Visitors that paid a single price for all elements of their trip were classified as package travelers. Visitors that said they were going to pay separately for the different elements of their trip and who did not intend to purchase any type of commercially available tour were classified as independent travelers. Visitors that were traveling independently but who did intend to purchase a tour of some sort were classified as "inde-package" travelers. (If a person intended to travel independently – without assistance from any tour group – except for the purchase of a one-hour sightseeing tour, that person would be classified as an inde-package visitor.)

Table 23 shows the percentage of independent, inde-package, and package travelers. This question was asked at the beginning of a trip to Alaska and the results do not account for individuals that later altered their intended travel type.

Table 23. Intended Travel Type
Fall/Winter 2000-01

Traveler Type	Percent of Visitors in Category
Independent	78
Inde-Package	10
Package	13

Note:

Percentages may not add to 100 due to rounding.

Table 24 shows the four most common responses to the question, " What is the primary non-business activity you hope to enjoy in Alaska on this trip?" Some visitors said the purpose of their trip was vacation and pleasure, but indicated that a common activity while in Alaska was to visit friends and family. Visitors traveling to Alaska who said the purpose of their trip was to visit friends and relatives are analyzed separately in Table 31 below (Profile for Visitors Visiting Friends and Relatives).

Table 24. Most Common Non-Business Activities
Fall/Winter 2000-01

Ranking	Activity (Percent of Responses)
Most common non-business activity	None or don't know (35 percent of responses)
Second most common non-business activity	Sightseeing (33 percent of responses)
Third most common non-business activity	Visit friends/family (18 percent of responses)
Fourth most common non-business activity	Fishing (4 percent of response)

Table 25 shows the place of origin for visitors to Alaska in Fall/Winter 2000-01. It is important to note that the sample collected on visitors from different locations was quite small. As a result, estimates of the number of visitors from the different locations should be viewed as approximations (for general planning purposes only) and not as statistically valid estimates.

Table 25. Place of Origin for Alaska Visitors
Fall/Winter 2000-01

Place of Origin	Percent of Arrivals	Number of Visitors
U.S.	91	231,600
West	55.3	139.500
South	14.5	37,300
Midwest	10.9	26,800
East	10.4	28,000
Canada	5	12,700
Europe	1	2,500
Pacific Region [a]	1	2,500
Japan [a]	1	2,500 (see note)
Russia	<1	Less than 2,500
Other	1	2,500
Refused to Answer	<1	Less than 2,500
Total	**100**	**254,500**

Notes:

Percentages may not add to 100 due to rounding.

[a] Visitor tallies suggest that approximately 1 percent of the visitors were from Japan in Fall/Winter 2000-01. However, there is a significant amount of uncertainty surrounding that estimate due to the small sample. Interviews with the five major tour businesses that bring Japanese visitors to Alaska suggest the total number of visitors from Japan was closer to 7,000 - or 2.8 percent of the total in Fall/Winter 2000-01.

Table 26 shows a comparison of arrivals, by place of origin, for visitors in Fall/Winter 1993-94 and 2000-01 (AVSP III and IV). As noted in the Prologue, care should be taken when using AVSP data to assess the place of origin for visitors. The AVSP is designed to give accurate information on the visitor population to Alaska. The sampling plan and other features of the AVSP would need to be changed if the objective were to give accurate information by place of origin or specific places visited in Alaska.

Table 26. Visitor Trends in Place of Origin
Fall/Winter 1993-94 and 2001-01

	1993-94	2000-01
Place of Origin	(Percent of Visitors)	
United States	88	91
Canada	5	5
Other	5	4

Note:

Percentages may not add to 100 due to rounding.

Table 27 shows a comparison of domestic arrivals, by place of origin, for visitors in Summer 1993 and Summer 2001 (AVSP III and IV). Care should be taken when using AVSP data to assess the state of origin for visitors. The AVSP is designed to give accurate information on the visitor population to Alaska. The sampling plan and other features of the AVSP would need to be

changed if the objective were to give reliable disaggregated information on visitors by state or countries of origin.

Table 27. Trends in Place of Origin for Domestic (U.S.) Visitors
Fall/Winter 1993-94 and 2001-01

Place of Origin in U.S.	Percent of Arrivals 1993-94	Percent of Arrivals 2000-01
West	**56.5**	**55.3**
Arizona	1.2	2.1
California	12.4	16.5
Colorado	1.3	2.3
Hawaii	2.3	0.1
Idaho	2.0	1.2
Montana	0.6	0.9
New Mexico	0.5	0.8
Nevada	0.9	1.0
Oregon	5.8	4.9
Utah	1.0	0.8
Washington	28.1	22.6
Wyoming	0.3	0.8
South	**18.4**	**14.5**
Alabama	0.0	0.8
Arkansas	0.4	0
District of Columbia	0.3	0
Delaware	0.2	0
Florida	1.6	3.7
Georgia	1.1	1.8
Kentucky	0.0	0.5
Louisiana	0.4	0.4
Maryland	0.5	1.0
Mississippi		
North Carolina	0.7	1.4
Oklahoma	0.9	0.7
South Carolina	1.0	0.2
Tennessee	0.0	0.6
Texas	7.4	5.2
Virginia	1.6	1.3
West Virginia	0.0	0.1

Place of Origin in U.S.	Percent of Arrivals 1993-94	Percent of Arrivals 2000-01
Midwest	**6.9**	**10.9**
Iowa	0.4	0.2
Illinois	1.3	1.8
Indiana	0.2	0.7
Kansas	0.1	0.6
Michigan	1.1	1.7
Minnesota	1.4	1.2
Missouri	0.2	1.0
North Dakota	0.3	0.2
Nebraska	0.4	0.5
Ohio	1.0	2.3
South Dakota	0.2	0.3
Wisconsin	0.3	0.6
East	**5.7**	**10.4**
Connecticut	0.2	0.8
Massachusetts	0.8	1.2
Maine	0.4	0.2
New Hampshire	0.3	0.4
New Jersey	0.4	1.2
New York	2.3	2.2
Pennsylvania	1.0	1.7
Rhode Island	0.0	0.1
Vermont	0.2	0.3
Total	**87.5**	**91.1**

Notes:

Percentages may not add due to rounding.

Due to small sample sizes, figures in this table should be used for discussion purposes only, not inference.

Overseas visitors came from more than 15 countries, and Canadian visitors came from five different provinces (mostly from B.C. and the Yukon Territory).

It may be important to note that the first objective of this report is to report the findings of AVSP IV. A number of issues related to marketing and planning are not addressed in this report. For example, a brief analysis of the place of origin for visitors is not included. While it would be easy to say that a significant portion of visitors come from Washington or California (23 percent and 17 percent of total visitors in Fall/Winter 2000-01, respectively), it is difficult to know whether such comments for other states with smaller numbers of responses are reliable. When comparing the number of visitors from different locations, it may be necessary to consider the size of the population in those areas, ease of access from the area (e.g., availability of direct flights), level of marketing effort in those areas, and other factors.

3.3   Mode Use Patterns

Visitors to Alaska can arrive and depart by a variety of modes and many people in the tour and travel industry are interested in the combined mode use (entry and exit) for visitors.

Table 28 shows the intended mode of exit for passengers, according to their mode of entry.

Table 28. Mode Use Patterns for All Visitors
Fall/Winter 2000-01

	Mode of Entry			
	Domestic Air	**International Air**	**Ferry**	**Highway**
Intended Mode of Exit	(Percent of Visitor Market)			
Domestic Air	96 [a]	44	19	10
International Air	2	52 [a]	2	0
Cruise Ship	<1	0	0	1
Ferry	<1	0	57 [a]	9
Highway – personal vehicles	<1	2	17	73 [a]
Other [b]	<1	0	<1	0
Don't Know or Refused	<1	2	5	7

Notes:

Percentages may not add to 100 due to rounding. Cruise Ship is not given as a mode of entry because of the small volume and the fact that no surveys were conducted with arriving cruise passengers. (This mode of entry is highlighted in the summer arrival and profile report.) Percentages may not sum to 100 due to rounding.

[a] Numbers show percentage of visitors arriving and departing by the same mode.

[b] Other includes commercial boat or freighter and private boat.

Table 29 shows the percentage of visitors that traveled one-way by a particular mode, the percentage that traveled round-trip by a particular mode, and the total percentage of visitors using each mode.

Table 29. Mode Market Size
Fall/Winter 2000-01

Mode or Entry or Exit	One-Way Users	Round-Trip Users	Total Users
	(Percent of Visitor Market)		
Domestic Air	0	90	90
International Air	2	<1	3
Cruise Ship	<1	0	<1
Ferry	<1	0	<1
Highway – personal vehicles	2	3	5
Other [a]	<1	na	<1
Don't Know or Refused	<1	na	<1

Notes:

Percentages may not add to 100 due to rounding.

na = not appropriate (cannot be considered as an option for round-trip since the mode is not a valid mode of entry)

3.4 Trip Purpose Profiles

The following tables provide a summary of visitor characteristics – mode of arrival, intended mode of departure from Alaska, place of origin, etc. – for each of the four major purposes of trips.

For the purpose of this report, visitors were classified as "independent" if they said they did not intend to purchase any type of sightseeing, fishing, or other type of tour or other package while traveling in Alaska. Any visitor that had purchased such a package in advance or indicated that they planned to purchase a package trip (regardless of duration) was classified as an "inde-package" visitor. Visitors that paid a single price for their transportation and accommodations were classified as a "package" visitor. These definitions were used in previous AVSP.

Data are presented for 1993-94 and 2000-01 to permit easy comparison. The side-by-side comparison suggests that visitors have become younger, more likely to purchase a package trip, and that visits have become shorter – except for the case of vacation and pleasure visitors. Vacation and pleasure visitors, on average, are older and tend to stay longer than in previous years. (The average age of visitors in 1993-94 is compared to the median age of visitors in 2000-01. Only median values were calculated in 2000-01 because that statistic more accurately depicts the typical visitor. Median values were not recorded in 1993-94.)

Profiles appear in order of size. Business Only visitors make up the largest component of the Fall/Winter visitor population, so that profile is presented first. Visitors who are visiting friends and relatives make up the second largest component of the Fall/Winter visitor population, followed by vacation and pleasure visitors, and business and pleasure visitors.

Table 30. Profile of Business Only Visitors
Fall/Winter 1993-94 and 2001-01

	1993-94	2000-01
Total Number of Business Only Visitors	90,900	111,900
Market Size (percent of total)	49.5	44
Entry Mode (percent of purpose of trip		
Domestic Air	98	98
International Air	1	<1
Highway – Personal Vehicles	1	2
Ferry	<1	<1
Intended Exit Mode (percent of purpose of trip)		
Domestic Air	97	94
International Air	2	2
Highway – Personal Vehicles	1	2
Ferry	<1	<1
Other (including Don't Know)	-	1
Intended Travel Type (percent of purpose of trip)		
Independent	93	86
Inde-Package [a]	2	3
Package	5	11
Intended Length of Stay (median number of nights)	10.9	7 days or less (62%)
Party Size (average size of party, number of people)	1.3	1.1
Previous Visits to Alaska (percent of purpose of trip)[b]		
Previous Pleasure Visits	61	11
Previous Business Only Visits	12	37
Other	-	4
Total with Previous Visits		51
Origin		
U.S.	92	94
Canada	2	4
Other	6	2
Refused to answer		<1
Median Age	38.2 (mean)	31 – 40 [c]

Notes:

Percentages may not add to 100 due to rounding. Due to small sample sizes, figures in this table should be used for discussion purposes only, not inference.

[a] Independents who plan to purchase sightseeing or other tours during their trip.

[b] The 1993-94 AVSP report presents information on the percent of visitors by trip purpose that visited for pleasure within the last five years. The 2000-01 AVSP reports information on the main purpose of the visitor's previous trip, if a repeat trip was made. The definition of Pleasure trips for 2000-01 includes Business and Pleasure, Vacation and Pleasure, and Visiting Friends and Relatives. Other responses used to live or work in Alaska.

[c] 41 percent of business only travelers were in the 31-40 age group; 33 percent were in the 41-50 age group.

**Table 31. Profile of Visitors Who Are Visiting Friends & Relatives
Fall/Winter 1993-94 and 2001-01**

	1993-94	2000-01
Total Number of VFR Visitors	40,800	64,000
Market Size (percent of total)	22.2	26
Entry Mode (percent of purpose of trip)		
Domestic Air	96	98
International Air	1	<1
Cruise Ship		0
Ferry	2	<1
Highway – Personal Vehicles	2	2
Intended Exit Mode (percent of purpose of trip)		
Domestic Air	96	94
International Air	1	2
Cruise Shiip		0
Ferry	1	<1
Highway – Personal Vehicles	2	2
Other (including Don't Know)	-	<1
Intended Travel Type (percent of purpose of trip)		
Independent	95	86
Inde-Package [a]	4	3
Package	1	11
Intended Length of Stay (median number of nights)	14.7 nights	7 days or less
Party Size (average size of party, number of people)	1.6	1.1
Previous Visits to Alaska (percent of purpose of trip)[b]		
Previous Pleasure Visits	66	11
Previous Business Only Visits	7	37
Other	-	4
Total with Previous Visits	69	51
Origin		
U.S.	95	94
Canada	1	4
Other	2	2
Refused to answer		<1
Median Age	40.2 (mean)	31-40 [c]

Notes:

Percentages may not add to 100 due to rounding. Due to small sample sizes, figures in this table should be used for discussion purposes only, not inference.

[a] Independents who plan to purchase sightseeing or other tours during their trip.

[b] The 1993-94 AVSP report presents information on the percent of visitors by trip purpose that visited for pleasure within the last five years. The 2000-01 AVSP reports information on the main purpose of the visitor's previous trip, if a repeat trip was made. The definition of Pleasure trips for 2000-01 includes Business and Pleasure, Vacation and Pleasure, and Visiting Friends and Relatives. Other responses used to live or work in Alaska.

[c] 17 percent of VFR travelers were less than 31 years of age; 36 percent were in the 31-40 age group.

Table 32. Vacation and Pleasure Visitors
Fall/Winter 1993-94 and 2001-01

	1993-94	2000-01
Total Number of Vacation & Pleasure Visitors	28,200	45,000
Market Size (percent of total)	15.4	18
Entry Mode (percent of purpose of trip)		
Domestic Air	63	85
International Air	6	1
Highway – Personal Vehicles	21	12
Ferry	10	2
Intended Exit Mode (percent of purpose of trip)		
Domestic Air	62	82
International Air	8	2
Highway – Personal Vehicles	20	10
Ferry	10	4
Other (including Don't Know)	-	2
Intended Travel Type (percent of purpose of trip)		
Independent	84	57
Inde-Package [a]	6	23
Package	10	19
Intended Length of Stay (median number of nights)	8.4 nights	8-14 days
Party Size (average size of party, number of people)	1.7	1.6
Previous Visits to Alaska (percent of purpose of trip)[b]		
Previous Pleasure Visits	54	44
Previous Business Only Visits	12	1
Other	-	8
Total with Previous Visits	51	52
Origin		
U.S.	63	81
Canada	20	11
Other	16	8
Refused to answer		1
Median Age	36.3 (mean)	31-40 [c]

Notes:

Percentages may not add to 100 due to rounding. Due to small sample sizes, figures in this table should be used for discussion purposes only, not inference.

[a] Independents who plan to purchase sightseeing or other tours during their trip.

[b] The 1993-94 AVSP report presents information on the percent of visitors by trip purpose that visited for pleasure within the last five years. The 2000-01 AVSP reports information on the main purpose of the visitor's previous trip, if a repeat trip was made. The definition of Pleasure trips for 2000-01 includes Business and Pleasure, Vacation and Pleasure, and Visiting Friends and Relatives. Other responses used to live or work in Alaska.

[c] 37 percent of vacation and pleasure travelers were in the 21-30 age group; 36 percent were in the 31-40 age group; and 25 percent were in the 41-50 age group.

Table 33. Business and Pleasure Visitors
Fall/Winter 1993-94 and 2001-01

	1993-94	2000-01
Total Number of Business & Pleasure Visitors	19,000	30,000
Market Size (percent of total)	10.4	12
Entry Mode (percent of purpose of trip)		
Domestic Air	92	87
International Air	3	5
Highway – Personal Vehicles	4	8
Ferry	2	<1
Intended Exit Mode (percent of purpose of trip)		
Domestic Air	91	88
International Air	3	2
Highway – Personal Vehicles	4	6
Ferry	1	<1
Other (including Don't Know)	-	3
Intended Travel Type (percent of purpose of trip)		
Independent	81	67
Inde-Package [a]	8	18
Package	11	15
Intended Length of Stay (median number of nights)	13 nights	7 days or less
Party Size (average size of party, number of people)	1.3	1.4
Previous Visits to Alaska (percent of purpose of trip)[b]		
Previous Pleasure Visits	28	38
Previous Business Only Visits	55	8
Other	-	5
Total with Previous Visits	58	50
Origin		
U.S.	90	86
Canada	6	7
Other	3	7
Refused to answer		0
Median Age	33.5 (mean)	31-40 [c]

Notes:

Percentages may not add to 100 due to rounding. Due to small sample sizes, figures in this table should be used for discussion purposes only, not inference.

[a] Independents who plan to purchase sightseeing or other tours during their trip.

[b] The information on previous visits is not directly comparable. The 1993-94 AVSP report presents information on the percent of visitors by trip purpose that visited for pleasure within the last five years. The 2000-2001 report information on the main purpose of the visitor's previous trip, if a repeat trip was made. The 2000-2001 report information on the main purpose of the visitor's previous trip, if a repeat trip was made. The definition of Pleasure trips for 2000-01 includes Business and Pleasure, Vacation and Pleasure, and Visiting Friends and Relatives. Other responses used to live or work in Alaska.

[c] 27 percent of business and pleasure travelers were less than 31 years of age and 30 percent were in the 31-40 age group.

3.5 Domestic Air Analysis

**Table 34. Profile of Visitors Arriving by Domestic Air
Fall/Winter 1993-94 and 2001-01**

	1993-94	2000-01
Total Domestic Air Arrivals	167,100	234,000
Market Size	91	92
Main Trip Purpose (percent of domestic air arrivals)		
Vacation/Pleasure	11	16
Visiting Friends and Relatives	23	26
Business and Pleasure	11	11
Business Only	53	46
Intended Exit Mode (percent of domestic air arrivals)		
Domestic Air	98	96
International Air	1	2
Highway – Personal Vehicles	<1	<1
Ferry	<1	<1
Other (including DK/RF)		1
Type of Traveler (percent of domestic air arrivals)		
Independent	-	78
Inde-package [a]	-	9
Package	-	13
Intended Length of Stay (percent of domestic air arrivals)		
Median	-	7 days or less
Mean	11.6 nights	
Average Party Size		1.3
Previous Visits to Alaska (percent of domestic air arrivals) [b]		
Previous Pleasure Visits	30	13
Previous Business Only Visits	51	32
Total with Previous Visits	71	57
Origin		
U.S. (percent of domestic air arrivals)	93	94
West (percent of U.S.)	60	60
Midwest (percent of U.S.)	7	2
South (percent of U.S.)	20	20
East (percent of U.S.)	6	9
Canada	1	3
Overseas	3	2
Median Age	37.6	31-40 [c]

Notes:

Percentages may not add to 100 due to rounding. Due to small sample sizes, figures in this table should be used for discussion purposes only.

[a] Independents who plan to purchase sightseeing or other tours during their trip.

[b] The 1993-94 AVSP report presents information on the percent of visitors by trip purpose that visited for pleasure within the last five years. The 2000-2001 reports information on the main purpose of the visitor's previous trip, if a repeat trip was made. The definition of Pleasure trips for 2000-01 includes Business and

Pleasure, Vacation and Pleasure, and Visiting Friends and Relatives. Other responses used to live or work in Alaska.

[c] 26 percent of business and pleasure travelers were less than 31 years of age and 28 percent were in the 31-40 age group.

3.6   Regional Profile

Profiles can be constructed to show the characteristics of visitors that travel to different regions within the state. However, such regional profiles should be used for discussion purposes only rather than business planning. This informal use is recommended due to the limited precision of the regional profiles.

The following regional profiles offer information such as the average age and income of visitors who intended to travel to the various regions. While the average values for a given characteristic may appear to differ across regions, the values may not be truly different. In most cases the range of responses is too great to say that the averages are different. For example, the data may show that people who visit a particular region are slightly older or have a slightly higher income than the visitor who travel to another region. But the range of responses – the range of ages of people that visit the regions and the range of incomes of people who visit the regions may be so broad that one group really does not have an older population or higher income. (Technically, the variance in responses within the two groups is so large that the means are not statistically different.)

Such concerns not withstanding, regional profiles can be interesting and can provide a starting point for further discussions. Table 35 provides a summary of visitor characteristics by region.

Table 35. Profile of Visitors by Region Visited
Fall/Winter 2001-01

	Region Visited				
	Denali Park	**Interior/North**	**Southeast**	**Southcentral**	**Southwest**
Percent of Visitors that visited Region	27%	50%	47%	52%	19%
No. of Visitors	67,258	125,391	118,104	129,783	46,968
Average Age	47.5	45.8	47.3	45.4	51.0
Dominant response:					
Household Income	$50-$74,999	$50-$74,999	$50-$74,999	$50-$74,999	$50-$74,999
Trip purpose	Business only	Business only	Business only	Business only	Business only
Traveler type	Independent	Independent	Independent	Independent	Independent
Trip length	7 days or less	7 days or less	7 days or less	7 days or less	7 days or less
Mode of arrival	Domestic air	Domestic air	Domestic air	Domestic air	Domestic air
Mode of departure	Air to USA	Air to USA	Air to USA	Air to USA	Air to USA

Appendix A – Supporting Data for Total Arrivals

The following tables provide more detailed information on total arrivals for each mode of travel. These tables highlight the seasonal variation in arrivals and show again the sources of data for each mode. Table 36 provides additional detail on total arrivals (residents and visitors combined) by air.

Table 36. Arrivals by Air (Residents and Visitors Combined)
Fall/Winter 2000-01

Point of Entry	Oct-00	Nov-00	Dec-00	Jan-01	Feb-01	Mar-01	Apr-01	Season Total
Anchorage								
Domestic	79,322	80,369	83,182	73,188	67,026	92,951	76,428	552,466
International	1,390	1,651	912	1,038	1,096	1,557	1,360	9,004
Fairbanks								
Domestic	7,516	8,166	10,136	7,701	6,835	9,560	6,965	56,879
International	84	59	69	30	84	124	84	534
Other [a]	13,500	12,552	14,012	9,822	8,509	12,887	10,910	82,192
Total Arrivals								
Domestic	100,338	101,087	107,330	90,711	82,370	115,398	94,303	691,537
International	1,474	1,710	981	1,068	1,180	1,681	1,444	9,538

Source: Airports, Alaska Airlines, and Delta Airlines (airport data plus data from individual airlines that have both interstate and intrastate flights).

Notes:

[a] "Other" includes all airports other than Anchorage and Fairbanks (other airports where passengers could deplane for the first time in Alaska).

Table 37 provides additional detail on total arrivals (residents and visitors combined) by ferry.

Table 37. Arrivals by Ferry (Residents and Visitors Combined)
Fall/Winter 2000-01

Port of Departure	Oct-00	Nov-00	Dec-00	Jan-01	Feb-01	Mar-01	Apr-01	Season Total
Prince Rupert, B.C.	783	723	750	664	678	1,039	1,060	**5,697**
Bellingham, WA	645	410	611	239	490	572	855	**3,822**
Total Arrivals	**1,428**	**1,133**	**1,361**	**903**	**1,168**	**1,611**	**1,915**	**9,519**

Source: Alaska Marine Highway System (AMHS).

Table 38 and Table 39 show arrival figures at highway crossings for people in private vehicles and motorcoaches, respectively. As noted, it is possible that some of the people that enter Alaska by highway and shown in these tables also enter by other modes. (A person traveling to Alaska on the ferry and driving from Haines or Skagway north into Canada and back into Alaska on the Alcan Highway would be included in the ferry and highway arrival figures.) Figures in Table 38 and Table 39 have <u>not</u> been adjusted for possible double counting.

Table 38. Highway Entries – People in Private Vehicles (Residents and Visitors Combined)
Fall/Winter 2000-01

Point of Entry	Oct-00	Nov-00	Dec-00	Jan-01	Feb-01	Mar-01	Apr-01	Season Total
Alcan Highway (Beaver Creek)	3,246	2,508	1,910	2,030	2,023	2,292	5,149	**19,158**
Haines Highway (Dalton Cache)	2,335	1,292	1,038	1,360	1,165	1,471	2,625	**11,286**
Klondike Highway (Skagway)	2,612	1,222	1,124	1,352	1,410	2,916	4,646	**15,282**
Taylor Highway (Poker Creek) [a]	0	0	0	0	35	586	0	**621**
Total Arrivals	**8,193**	**5,022**	**4,072**	**4,742**	**4,633**	**7,265**	**12,420**	**46,347**

Source: U.S. Customs Service, Anchorage Area Port Senior Inspector; limited duplicate data also collected from individual border stations.

Notes:

[a] Taylor Highway closed in winter. Border crossings during winter are primarily snowmachines during cross border races.

Table 39. Highway Entries – People in Motorcoaches (Residents and Visitors Combined)
Fall/Winter 2000-01

Point of Entry	Oct-00	Nov-00	Dec-00	Jan-01	Feb-01	Mar-01	Apr-01	Season Total
Alcan Highway (Beaver Creek)	60	6	111	41	83	86	61	**448**
Haines Highway (Dalton Cache)	93	141	13	59	43	63	67	**479**
Klondike Highway (Skagway)	28	47	1	50	19	116	131	**392**
Taylor Highway (Poker Creek)	0	0	0	0	0	0	0	**0**
Total Arrivals	**181**	**194**	**125**	**150**	**145**	**265**	**259**	**1,319**

Source: U.S. Customs Service, Anchorage Area Port Senior Inspector; limited duplicate data also collected from individual border stations.

In addition, one cruise company reported 189 passenger arrivals in Alaska in April 2001. No other cruise lines reported arrivals in Fall/Winter 2000-01.

Appendix B – Adjusting Highway and Ferry Arrivals

Visitors traveling east to west into Alaska from Canada – especially those arriving at the Alcan Border Station – could be double counted because they could have traveled south to north into Alaska on the ferry. The amount of double-counting must be determined and appropriate adjustments made to ensure that visitor tallies are accurate.

Data from U.S. Customs Service show that the volume of people entering Alaska by highway in the Fall/Winter season is highly correlated with ferry use. The Port Director at the U.S. Customs border station on the Alcan Highway at Beaver Creek estimates that 60-70 percent of the people entering Alaska on the highway in Fall/Winter disembark the ferry at Haines or Skagway approximately one day before being counted at the border station. [10] As a result, it is assumed that 60-70 percent of the people identified as visitors at the Alcan Station were also counted at the ferry terminal in either Prince Rupert, B.C. or Bellingham, WA. (Visitors that are surveyed reveal whether the highway border crossing is their first point of entry into Alaska. However, that information is not collected for other travelers. Other travelers are simply asked whether they are a resident or visitor. Future visitor tallies at the highway stations should include a separate question for all travelers regarding their first point of entry.)

The Port Director at the U.S. Customs border station on the Haines Highway estimates that 75-80 percent of the border crossings in Fall/Winter is ferry traffic. The immigration inspector at the Skagway believes only 20 percent of the border crossings on the Klondike Highway are ferry traffic. The important issue at these two border crossings is whether a person entering Alaska is actually a visitor <u>departing</u> Alaska. (This information would be helpful because a departing visitor should not be counted as an arriving visitor.) U.S. Customs officials at these two stations say a majority of the people traveling to the ferry are from the Yukon and Northwest Territories – not residents of other parts of Canada or the Lower 48 that might have been visitors using the ferry on their trip home.

The Random Arrival Survey includes a question about the expected mode of departure from Alaska. Responses to this question indicate that 2,800 visitors intend to depart Alaska by ferry, with some of those departures taking place in the Summer season – as many visitors arriving in Alaska in April do not depart until May. In addition, some of the visitors arriving by ferry stay in Southeast Alaska and would not renter the state at Haines or Skagway, and would not affect the border counts at those stations. That is, only some fraction of the 2,800 visitors that say they intend to depart by ferry may have crossed the border at Haines or Skagway, and may need to be "netted out" of the highway arrivals in those locations.

Approximately 16 percent of the ferry passengers traveling north in the Fall/Winter season are visitors. If a similar percentage are visitors on the southbound routes, then there would be roughly 1,300 visitors departing by ferry. (There were 8,382 disembarking passengers in Prince Rupert, B.C. and Bellingham, WA in Fall/Winter 2000-01.) Again, only a fraction of these passengers would have started the trip in Haines or Skagway and would need to be netted out of the highway arrivals in those locations.

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[10] Conversations with ferry travelers at Bellingham, WA and Prince Rupert, B.C. reveal that ferry travelers using the highway to access Southcentral and Interior Alaska tend to use the ferry terminal at Haines. Haines is 200 miles closer than Skagway to Beaver Creek by highway. This finding is consistent with the higher percentage of ferry traffic seen at the Haines and Beaver Creek border stations compared to the Skagway border station.

Given the number of visitors that said they would be departing by ferry and percentage of passengers on northbound routes that are visitors, it seems that only a small percentage of the people entering Alaska by highway at Haines and Skagway might be visitors that could be double counted. Assuming that 1,000 visitors enter Alaska by highway at Haines to board the ferry in Haines on their return trip is the same as assuming that 12 percent of the border crossings at that station would be double counted (1,000 out of 8,500 people entering Alaska at that station). If arrivals at the Skagway station are also considered, the percentage falls to less than 5 percent.

If 70-80 percent of the arrivals during Fall/Winter at the Haines border station are ferry passengers and most of those travelers are actual arrivals from Canada, then perhaps 5 to 15 percent of the arrivals are visitors to Alaska on their trip home. These people should not be counted as arrivals.

The assumption that 5 percent of the people entering Alaska – traveling south – at the Haines border station is an initial assumption, based on responses from visitors regarding their mode of departure from Alaska, the percentage of ferry passengers traveling north that are visitors, and anecdotal evidence from personnel at the Haines and Skagway stations. Additional research is needed to determine a more credible estimate. Still, the estimate of 5 percent is used in this report and arrivals at the Haines border station are adjusted accordingly.

Visitor arrivals in previous AVSP were adjusted for double counting, but the methodology is not known and the degree to which adjustments were needed seems to have been much smaller in earlier years. Moreover, it seems that adjustments were made for visitor arrivals only. As a result, most of the comparisons in the body of this report show adjusted arrivals from 2001 and unadjusted arrivals from earlier years.

Appendix C – Margins of Error

This report contains numerous statistics, such as estimates of the number of visitors arriving by each mode of travel, the purpose of the trip, employment status, age, and gender. These statistics are the best possible estimates of the actual true values (for example, the number of visitors that really do arrive by each mode). However, there are a variety of factors that may cause each statistic or estimate to differ from the relevant true value for the visitor population.

The accuracy of statistics based on survey data depends on a variety of factors. Those factors include, but are not limited to, the size of the sample relative to the overall population, characteristics of the real population, the structure of the individual questions, and the manner in which the data are collected. To acknowledge this inherent uncertainty, estimates are said to be within a certain range - or margin of error - around the true value.

In principle, the margin of error should be calculated separately for each statistic that is presented in a report or table. The reason the margin of error should be calculated separately for each statistic is that each statistic depends on a specific set of factors. For example, the sample size and percentage of the visitor population that arrives by domestic air may not be the same as the sample size and percentage that arrives by cruise ship. As a result, the margin of error may be different for estimates that describe the visitors that arrive by different modes.

The next two subsections explain the margins of error for visitor arrival estimates and figures in the visitor profile. The margins of error differ for these different estimates because the estimates are based on different samples and data collection techniques. The final subsection explains why certain statistics in this report should be used for discussion purposes only, not inference or to support further analysis.

Arrivals

The accuracy of statistics in the visitor arrival section of the report depend on the number of people counted in the tallies, the portion that was visitors, and the total number of arrivals for the mode. (The accuracy of estimates of visitor arrivals does not depend on the number of random arrival surveys conducted.)

Table 40 shows the margins of error for the estimate of visitor arrivals for the season, and for the season for each mode where tallies were conducted.

Table 40. Margins of Error for Visitor Arrival Estimates
Fall/Winter 2000-01

Mode	Number of People Counted in Tallies	Visitor Percent	Total Arrivals	Estimate of Visitor Arrivals	Implied Margin of Error
All	35,393	34 %	745,400	251,100	+/- 1 %
Domestic Air	29,438	34 %	691,500	234,000	+/- 1 %
International Air	800	49 %	9,600	4,700	+/- 3.6 %
Highway – priv. autos	1,300	31 %	34,800	10,800	+/- 4.1 %
Ferry	3,855	16 %	9,500	1,600	+/- 3.5 %

This table shows that the sample plan resulted in very reliable estimates of visitor arrivals, both overall and by mode.

It is important to note that estimates of visitors that arrive by a particular mode and who are traveling for a particular purpose, or who are a particular traveler type will have larger margins of error. These larger margins are due to the effects of splitting the data in multiple ways and the resulting small samples.

Visitor Profile

The statistics in the visitor profile section of this report depend on the data collected with the random arrival surveys. As a result, the accuracy of those statistics depends on the number of surveys conducted compared to the size of the visitor population. Moreover, the accuracy will vary depending on whether the statistic is for the visitor population as a whole, visitors entering Alaska by a certain mode, visitors traveling for a particular reason, or some other measure. The variation is due to the fact that the effective sample size and relevant population are different in each case.

When a large number of statistics are generated -- such as those in this report -- it is often useful to report generalized margins of error for the reader/analyst. In general, the margin of error for statistics in this report is +/-1.2 percent at the 90 percent confidence level and +/-2.3 percent at the 95 percent confidence level. Statistics for smaller subsets of the visitor population have a higher margin of error than do statistics for the visitor population as a whole.

The margins of error for statistics in this report are similar to the true margins of error for statistics found in previous reports.[11]

Table 41 summarizes the margins of error, by mode of arrival, for most of the statistics in this report.

Table 41. Margins of Error for RAS
Fall/Winter 2000-01

Segment of Visit Population and Purpose of Statistic	Margin of Error at 90 Percent Confidence Level	Margin of Error at 95 Percent Confidence Level
Total Visitor Arrivals	< +/- 1.2%	< +/- 2.3%
Characteristics of All Visitors	+/- 1.2%	+/- 2.3%
Visitor Arrivals by Mode of Entry	+/- 2%	< +/- 3%
Characteristics of Visitors, by Mode of Entry		
Domestic Air	+/- 1.2%	+/- 2.4%
Highway		
Private vehicles	+/- 6.0%	+/- 11%
Motorcoach	No sample	No sample
International Air	+/- 6.9%	+/- 13.6%
Ferry	+/- 3.6%	+/- 7.0%
Cruise Ship	No sample	No sample

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[11] The margins of error presented in previous reports were for statistics that related to the visitor population as a whole. Margins of error were not reported for statistics related to different segments of the visitor population.

The figures in this table illustrate again that statistics for the visitor population as a whole are quite accurate. However, care should be taken when looking at statistics for subgroups of the visitor population.

Other Statistics and Factors

As noted throughout this report, the precision of an estimate or a statistic is often described by a confidence interval. For example, it is possible to calculate a 95 percent confidence interval around a given statistic. To picture the meaning of a 95 percent confidence interval, imagine taking an infinite number of samples from a specified population, and for each sample computing the mean value and the confidence interval – 95 percent of those intervals would contain the true mean of the population. The smaller the sample size, the larger the interval… or margin of error.

Several tables in this report contain a table note that says the data in the tables should be used for discussion purposes only, not for inference or to support further analysis. This cautionary note is needed because the data have been sorted so many times to derive the numbers, that the resulting numbers are not precise estimates.

The following equation can be used to calculate a 95 percent confidence interval around the estimate of a population average:

$$\overline{X} - t_{n-1,0.0025}\sqrt{\frac{s^2}{n}} \le \mu \le \overline{X} + t_{n-1,0.0025}\sqrt{\frac{s^2}{n}}$$

In this equation, $\overline{X}$ is the average value based on the sample data, t is a value taken from a statistical table, s^2 is the sample variance, n is the sample size, and μ is the true average value for the population.[12]

Smaller sample sizes increase the width of the confidence interval for several reasons. First, the value of t depends on the sample size and the level of confidence, which in this example is 95 percent. Smaller sample sizes give larger value for t. Second, the sample size itself directly influences the size of the confidence interval – and it does so in an inverse manner. Smaller sample sizes immediately make the confidence interval larger.

Table 42 summarizes the effect on the confidence interval of reducing the sample size. The values shown in the table for sample size are illustrative, based on the following ideas:

- The initial sample of 2,000 is similar to the number of random arrival surveys completed in Fall/Winter 2000-01.

- The reduced sample of 50 represents the sample that might be obtained for visitor arriving by a particular mode, traveling for a particular purpose, or be of a particular type. (In almost all cases in AVSP IV the sample in such cases was larger than 50. However, it is easy to imagine this scenario for cases such as arrivals by international air or for package travelers.)

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[12] Equation taken from Elements of Econometrics, by Jan Kmenta (Macmillan Publishing Company, 1986)

- The sample of 20 represents the sample that might be obtained for a particular visitor type arriving by a particular mode. For example, iIf 40 percent of the 50 visitors arriving by ferry were traveling for vacation/pleasure, then the resulting sample size would be 20.

- The final sample of 5 represents the sample that might be obtained for visitors from a particular country or state in the U.S. of foreign.

Table 42. Stylized Example of 95% Confidence Interval with Different Sample Sizes

	Confidence Interval and Sample Size			
	n = 2,000	n = 50	n = 20	n = 5
95% Confidence Interval, with sample mean = 20 and sample variance = 100	+/- 1%	+/- 6%	+/- 10.5%	+/- 28%

This example does not show the effect of factors such as non-response or of having questions with multiple choices. Still, it illustrates the effects of small sample sizes.

Statistics with margins of error or a confidence interval of more than +/- 10 percent are noted in this report and every effort has been made to inform the reader that such statistics are not precise.

Appendix D – Random Arrival Survey

Professionally trained surveyors used a Palm Pilot with the survey provided below programmed into the computer to conduct the Random Arrival Survey. Surveyors approach a prospective respondent and determined if he/she was a resident or visitor. The survey was administered only to visitors. Surveyors were instructed to vary the age and gender of respondents so some surveys are conducted with males and some with females. As with earlier AVSP, surveys were administered only to respondents over the age of 17. [13]

 The text below was taken from the surveyor-training manual. That text provides two introductory paragraphs and a copy of the random arrival survey. (It may be helpful to note that the survey program allowed inputs for up to 16 individuals in a traveling party. The program would automatically cycle through the appropriate questions as many times as needed so that information could be collected for each person in the party. As a result, question numbering in the following text is not sequential.)

"Due to the screen size of the Palm Pilot, only key phases are indicated for each question. You will need to refer to the questionnaire below for the full phrasing of each question as you conduct intercept interviews.

"Questions 1 through 5 are for administration purposes only. Do not ask respondent these questions. When the study comes up, check that the date and time are correct. To change the date or time, tap on the incorrect display and reset using the arrows. Tap "ok" to return to previous screen and then tap "done." Wait a few seconds until the title screen comes up and then tap "start." For each question in the study, tap the appropriate response and tap the forward arrow key to move to the next screen. Use the reverse arrow key to return to a previous screen. You must reenter answers for each question from the point you backed up to.

1.   Admin: Surveyor, Date, Location, or Mode change?

                                                                                            YES

                                                                                NO (GOTO 6)

2.   Surveyor Name:

                                                            RECORD SURVEYOR'S NAME

3.   Survey Date:

                                                            TAP "EDIT DATE" TO CHANGE DATE

---

[13] In AVSP III, surveyors selected visitors at the various points of arrival – to the extent possible – based on a random number table. The same approach was not possible in AVSP IV for a variety of reasons. During the survey pretest in summer 2000, the consultant team learned there was less time to conduct surveys with visitors arriving by domestic air (with no access to jetways) and a higher incidence of visitors declining to be interviewed compared to AVSP III. Strategies such as interviewing air and ferry passengers at points of departure also made that technique inappropriate. (In those cases, surveyors selected visitors at random at airline departure gates or ferry terminal waiting areas. Surveyors often were able to interview ALL visitors boarding a ferry.)

4.   Survey Location:

<div align="right">

ANCHORAGE AIRPORT/DOMESTIC

ANCHORAGE AIRPORT/INTERNATIONAL

FAIRBANKS AIRPORT/DOMESTIC

JUNEAU AIRPORT/DOMESTIC

KETCHIKAN AIRPORT/DOMESTIC

SITKA AIRPORT/DOMESTIC

ALCAN BOARDER

POKER CREEK BOARDER

SKAGWAY BOARDER

HAINES BOARDER

BELLINGHAM FERRY TERMINAL

PRINCE RUPART FERRY TERMINAL

CANADA PLACE CRUISE TERMINAL

BALLANTYNE CRUISE TERMINAL

OTHER

</div>

5. Transport Mode:

<div align="right">

DOMESTIC AIR

INTERNATIONAL AIR

FERRY

CRUISE SHIP

HIGHWAY

OTHER

</div>

Good morning/afternoon/evening. Welcome to Alaska. I'm conducting an official research study sponsored by the State of Alaska Division of Tourism. I need to take a few minutes of your time to ask you a few simple questions.

6.   Is this the first stop in Alaska for you?   YES   1

                                                                        THANK, TERMINATE<--NO   2

7.   Are you a resident of Alaska or a seasonal worker?

THANK, TERMINATE<--YES (go to end)   1

NO   2

8. What is your country of residence?   US   1

CANADA   2

OTHER (Specify)   3

9. What is the main purpose of this Alaska trip?   Is it . . .

BUSINESS ONLY   1

BUSINESS AND PLEASURE   2

VACATION AND PLEASURE   3

TO VISIT FRIENDS OR RELATIVES   4

10. How long will you be in Alaska during this trip?   7 DAYS OR LESS   1

8 – 14 DAYS   2

15 – 30 DAYS   3

MORE THAN 30 DAYS   4

DK   9

11. We're doing a survey of visitors for the State of Alaska Division of Tourism.   The most important part of the survey is a diary of daily expenses. This information helps us improve the visitor experience here in Alaska. Would you be willing to complete a Visitor Diary during your stay in Alaska? IF YES: CONTINUE. IF NO: PERSUADE, CITE INCENTIVES (7-day Caribbean cruise, round trip airline tickets and Alaska ski vacation, wilderness vacation at Denali Lodge, hotel accommodations).   IF HARD REFUSAL: THANK, TALLY, AND TERMINATE.   YES   1

NO (PERSUADE OR TERMINATE)   2

12. Will/Did you add days beyond the business portion of your trip for the non-business portion of your trip?   YES   1

NO   2

DK/RF   9

13. What is the primary non-business activity you hope to enjoy in Alaska on this trip?

NONE   1

SIGHTSEEING   2

FISHING   3

HIKING   4

CANOEING   5

TOURING GLACIERS   6

KAYAKING   7

CAMPING   8

DOG SLEDDING   9

MOUNTAIN CLIMBING 10

SNOW SKIING 11

TRAIN TRIP 12

VIEWING NORTHERN LIGHTS 13

VISITING A GOLD MINE 14

VISITING FAMILY AND FRIENDS 15

WHALE WATCHING 16

WILDLIFE VIEWING 17

OTHER (SPECIFY) 18

DK/RF 99

14. What is the secondary non-business activity you hope to enjoy in Alaska on this trip?

SIGHTSEEING   1

FISHING   2

HIKING   3

CANOEING   4

TOURING GLACIERS   5

KAYAKING   6

CAMPING   7

DOG SLEDDING   8

MOUNTAIN CLIMBING   9

SNOW SKIING 10

TRAIN TRIP 11

VIEWING NORTHERN LIGHTS 12

VISITING A GOLD MINE 13

VISITING FAMILY AND FRIENDS 14

WHALE WATCHING 15

WILDLIFE VIEWING 16

NONE 17

OTHER (SPECIFY) 18

DK/RF 99

15. What is the third non-business activity you hope to enjoy in Alaska on this trip?

SIGHTSEEING 1

FISHING 2

HIKING 3

CANOEING 4

TOURING GLACIERS 5

KAYAKING 6

CAMPING 7

DOG SLEDDING 8

MOUNTAIN CLIMBING 9

SNOW SKIING 10

TRAIN TRIP 11

VIEWING NORTHERN LIGHTS 12

VISITING A GOLD MINE 13

VISITING FAMILY AND FRIENDS 14

WHALE WATCHING 15

WILDLIFE VIEWING 16

NONE 17

OTHER (SPECIFY) 18

DK/RF 99

16. Will you also be visiting friends or relatives here in Alaska?   YES 1

NO 2

DK/RF 9

17. Will you . . .

STAY ONLY IN THE LOCAL AREA WHERE FRIENDS OR RELATIVES LIVE   1

ALSO GO TO OTHER AREAS OF ALASKA   2

DON'T KNOW/ NOT SURE   9

18. What mode of transportation will you use when you leave Alaska, crossing the State line?

AIR TO USA   1

AIR TO FOREIGN DESTINATION   2

COMMERCIAL CRUISE SHIP   3

ALASKA STATE FERRY (GO TO Q19)   4

HIGHWAY (GO TO Q19)   5

COMMERCIAL BOAT/ FREIGHTER   6

PRIVATE BOAT   7

MILITARY BOAT   8

DK/RF   9

19. Will you be taking a vehicle onto a ferry?   YES (GO TO Q20)   1

NO   2

20. [IF Q.19 = 1] Which type of vehicle will you be using?   AUTO   1

CAMPER / RV   2

MOTORCOACH   3

OTHER   4

21. Did you pay a single price in advance for your transportation to Alaska *AND ALL* of your lodging, transportation, and activities within Alaska?

YES   1

NO   2

22. How many nights are included in the package?   RECORD NUMBER   ___

23. Did you purchase a package or additional package other than the package mentioned above (that is, paid a single price in advance) for any of your activities within Alaska?←--YES 1

←NO   2

24. Do you plan to purchase any day tours or sightseeing trips while you are here? YES   1

NO   2

NOT SURE   3

25. Including yourself, how many are traveling in your immediate party? Count only those with whom you will sharing expenses such as food, lodging, and local transportation.

#_____ IN PARTY

[CREATE PERSON ROSTER. RESPONDENT IS PERSON #1.]

26. What is your age?

RECORD WITH NUMBER

27. What is your gender?

MALE   1

FEMALE   2

28. [IF Q.26 >15] What is your employment status?

EMPLOYED FULL-TIME   1

EMPLOYED PART-TIME   2

UNEMPLOYED/LOOKING FOR WORK   3

STUDENT   4

RETIRED   5

HOMEMAKER   6

RF   9

29. Roster of others in traveling party

Repeat Q26 and 27 for up to 16 additional people in traveling party

74. Have you ever been to Alaska before?

YES   1

NO   2

75. What category best describes the main purpose of the trip?

BUSINESS ONLY	1
BUSINESS AND PLEASURE	2
VACATION AND PLEASURE	3
VISITING FRIENDS OR RELATIVES	4
USED TO LIVE OR WORK IN ALASKA	5

76. How many of these previous trips were for business?   # _____

77. How many of these previous trips were for pleasure?   #_____

78. Including yourself, how many people live in your household?   #_____

79. What was the total annual income of all household members, from any source, last year?

LESS THAN $25,000	1
$25,000 TO $49,999	2
$50,000 TO $74,999	3
$75,000 - $99,999	4
MORE THAN $100,000	5
RF	9

These are all the questions I have for you today. For this survey project to be complete, we would like to ask your opinions about and satisfaction with your Alaska trip after you return home. I need to get your home address so we can contact you for the opinion and satisfaction interview. {TRY TO GET THE RESPONDENT TO PROVIDE THIS INFORMATION)

80. NAME _____

81.   STREET ADDRESS _____

82.CITY _____ *83. STATE* _____ *84. ZIP CODE* _____

*85. TELEPHONE NUMBER (enter without spaces).*_____

86. E-MAIL ADDRESS _____ @ _____

87. Best way to contact?

<div align="right">

PHONE 8AM – NOON

PHONE NOON – 6PM

PHONE 6PM – 9PM

E-MAIL

REGULAR MAIL

</div>

88. SAMPLE NUMBER

88. SAMPLE NUMBER

Again, thank you very much for your help. We hope your stay in Alaska is pleasant and rewarding.

Appendix E – Weighting Methodology and SPSS Procedures

The data set for AVSP IV will be available on the Internet for interested parties to conduct further analysis if desired. The dataset will be provided as a text file, and as an SPSS (Statistical Program for the Social Sciences) file. This section provides information on the weighting methodology and the analytical procedures to aid those interested in replicating the results presented in this report, or in conducting additional analysis that that can be compared to these results.

The AVSP IV program featured three surveys for visitors to the state:

- The Random Arrival Survey (RAS) captured information about the traveling parties entering the state, and collected information on the number of people in the group, their ages, how long they intended to stay in Alaska, and other demographic information. Traveling parties answered the questions when they arrived in Alaska.

- The Visitor Expenditure Survey (VES) captured information about the purchases travelers made while staying in Alaska. Travelers returned the VES after they finished their Alaska vacation.

- The Visitor Opinion Survey (VOS) captured information about individuals' expectations and opinions of their Alaska trip. Travelers returned the VOS after they finished their Alaska vacation.

This appendix discusses the information contained in the RAS survey in terms of how to access it and use it. The data is stored in an SPSS format, and primary analysis was carried out using SPSS Base software. The information has been weighted so that information about the general population of visitors may be extrapolated from the available survey information. The first section of this appendix discusses the weighting methodology of the data. Information on using SPSS with the AVSP data, including sample Syntax, follows the weighting section. Procedures for the VOS and VES are presented in Appendix D in the Fall/Winter and Summer expenditures and opinion reports.

Data Weighting Methodology

The data collected in the three surveys for AVSP are sample data. Information was recorded by the mode of arrival into the state and the reported trip purpose, but the surveys can only provide information about some of the visitors to the state. By applying different weights, the survey information can be made to represent all of the visitors to Alaska. This section describes the process by which the weights were developed, and discusses how those weights are applied to the data.

The weights used with AVSP data are based on actual visitor arrival numbers for Alaska. The data were collected using a stratified random sampling design. Since the total number of visitors is available, it is an easy process to determine the weights necessary to expand the number of surveyed visitors into the total number of visitors of that type. The process used to calculate weights is to divide the total population count of visitors by the sample count of parties. The calculations are done separately for summer and winter. For winter, the weights are calculated separately for each of the five modes of entry. For summer, the weights are calculated separately for each of 25 strata, or combinations of mode of entry and month of arrival. The only exception is for International Air, for which sample observations were only available for three of the five months. In this case, all International Air surveys are counted as one weighting class.

Using this design, the weights are calculated by the following formula:

$$w_{hj} = \frac{N_h}{n_h},$$

where N_h denotes the population counts for each of the 30 strata (h denotes the stratum). The denominator for these weights, the sample count n_h, is obtained by summing the numbers of observations in the data set for each of the 30 strata. The user can obtain these sample counts for each of the month-mode combinations for Summer, and the five mode combinations for Winter. The sample weights can then be computed using the above formula.

Table 43 shows the total arrival numbers, number of parties surveyed, and the weights for both the winter and summer surveys. Where applicable, further steps are taken to adjust the weights by the number of people in the party.

The weight calculation in Table 43 will be found in any reports that provide data at the individual level, such as the RAS. Group-level data will have different weights because the average group size is greater than one.

Using the weights generated above, the user can calculate the sample total and means using the formula,

$$\hat{t} = \sum_{h=1}^{H} \sum_{j \in S_h} w_{hj} y_{hj} .$$

The response variable is denoted by y_{hj}. This denotes the observation j in stratum h. This variable is multiplied by the corresponding stratum weight calculated above. For example, an observation collected in August for domestic air is multiplied by the weight developed for the August and domestic air stratum. Each observation in the data set is weighted. This weighted variable is then summed over the sample (S_h) for each stratum, and then summed over all strata (this corresponds to the two sums in the formula).

The estimate of the population mean is then,

$$\bar{y} = \frac{\sum_{h=1}^{H} \sum_{j \in S_h} w_{hj} y_{hj}}{\sum_{h=1}^{H} \sum_{j \in S_h} w_{hj}} .$$

The total is just divided by the population size.

The variables of interest can be generated using the above formula and then compared with the tables of final results.

Table 43. Total Arrival Counts and Data Weights

Season	Mode of Arrival	Month	Population	Parties Surveyed	Data Weight
Summer	Domestic Air	May	67,930	11	6,175.45
Summer	Domestic Air	June	131,697	48	2,743.69
Summer	Domestic Air	July	163,671	39	4,196.69
Summer	Domestic Air	August	156,750	67	2,339.55
Summer	Domestic Air	September	52,866	32	1,652.06
Summer	**Domestic Air**	**Total**	**572,914**		
Summer	International Air	May	1,461	0	
Summer	International Air	June	4,117	6	1,175.46
Summer	International Air	July	4,442	7	1,175.46
Summer	International Air	August	4,257	0	
Summer	International Air	September	1,004	0	
Summer	**International Air**	**Total**	**15,281**		
Summer	Ferry	May	1,585	35	45.29
Summer	Ferry	June	5,135	33	155.61
Summer	Ferry	July	5,083	6	847.17
Summer	Ferry	August	4,470	16	279.38
Summer	Ferry	September	935	6	155.83
Summer	**Ferry**	**Total**	**17,208**		
Summer	Cruise	May	107,000	21	5,095.24
Summer	Cruise	June	123,000	31	3,967.74
Summer	Cruise	July	138,000	23	6,000.00
Summer	Cruise	August	130,000	22	5,909.09
Summer	Cruise	September	12,000	7	1,714.29
Summer	**Cruise**	**Total**	**510,000**		
Summer	Highway	May	9,859	20	492.95
Summer	Highway	June	30,198	26	1,161.46
Summer	Highway	July	39,600	53	747.17
Summer	Highway	August	30,724	24	1,280.17
Summer	Highway	September	8,585	14	613.21
Summer	**Highway**	**Total**	**118,966**	**547**	
	Summer Total		**1,234,369**		
Winter	Domestic Air	All	234,000	215	1,088.37
Winter	International Air	All	3,500	5	700.00
Winter	Ferry	All	1,600	76	21.05
Winter	Highway	All	10,600	27	392.59
	Winter Total		**249,700**	**323**	

Note: Due to the small number of samples, the weights for International Air arrivals during the summer are based on all arrivals, similar to what was done for the winter weights.

SPSS Analysis Procedures

Almost all of the data analysis involved in the AVSP study was conducting using the SPSS Base software. A minimal amount of work was done using Microsoft Excel. For this reason, and understanding of SPSS is vital for working with the AVSP data. This section discusses the procedures necessary to work with the SPSS data.

The general procedure for using SPSS with the AVSP data is as follows:

- **Apply weights, if required.** Most of the analysis work presented in this report requires that the data be weighted so that results apply to the entire population and in the correct proportion of visitor types. To apply weights, simply navigate to the Data menu, select Weight Cases, and instruct SPSS to weight cases by the weighting variable. The weighting variable is located near the end of the variable list, and is named *wt* for the RAS. If you do not see the weight variable, look at the "Variable View" to find a variable labeled as some sort of weight. Weights are not always required; using unweighted data can show the number of respondents to specific variables.

- **Select case, if required.** Many types of analysis require that only some cases be selected. When using data sets that contain all survey responses, the user must first filter by the phase (2=Fall/Winter, 3=Summer) so that the analysis focuses on a specific season. Other common filters are on mode of arrival (TMODE) and trip purpose (TPURP).

- **Run the analysis.** A variety of analysis tools are used. The three primary analysis tools are Frequencies, Crosstabs, and Compare Means. Frequencies are used to find basic statistics on variables, as well as to find ordinal responses, such as Trip Length (LEGTH). Crosstabs analyze two variables simultaneously, such as looking at Trip Length categories by Mode of Arrival. Compare Means allows the user to calculate statistics on a variable that has been separated into categories, such as the average Party Size by Trip Purpose (PARTY by TPURP).

Most of the RAS procedures are basic and should be very familiar to experienced SPSS users. Most of the data is available in a single variable, allowing for use of the three basic analysis types shown above. However, some variables are best treated as multiple response variables. Users experienced with SPSS will note that SPSS allows these variables to be grouped together under the Analyze/Multiple Responses menu, which greatly reduces the time required for analysis. An example of this is the AGE variable, for which there are 16 variables available for groups to enter their ages.

The RAS data should be weighted by the *wt* variable before use. This will ensure that the data add to the proper totals and be representative of the visitor population. The only exception to always weighting the data is when the user simply wants to get a survey count, in which case the objective is to count the unweighted number of reponses.

Since the RAS data contains both Fall/Winter and Summer data, filtering is required. For most analysis, the filter only needs to be set for PHASE=2 (for Fall/Winter) or PHASE=3 (for Summer). Additional variables may be filtered, such as by mode of entry or trip purpose, but most of the analysis by mode or purpose is done using crosstabulations.

The three basic statistical tools mentioned earlier in this section should suffice for all of the RAS analysis. Almost all of the variables can be analyzed separately. The RAS data does contain information on prior trips and the ages of party members, but most of this information can be analyzed separately. If grouping is needed, the Analyze/Multiple Reponses… menu should suffice.

An alternative way to calculate the average age of visitors is through the use of Syntax. If the basic menu commands prove difficult to use, then the following Syntax can be run to do a quick calculation of the average age:

```
COMPUTE SUM_AGE = SUM.1 (AGE1 TO AGE16).

COMPUTE NUM_AGE = NVALID(AGE1 TO AGE16).

COMPUTE CONSTANT = 1.
```

```
AGGREGATE  OUTFILE=*  /BREAK=CONSTANT  /SUM_AGE  NUM_AGE  =  SUM(SUM_AGE
NUM_AGE).
```

```
COMPUTE MEAN_AGE = SUM_AGE/NUM_AGE.
```

```
LIST.
```